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# APPRECIATIVE INQUIRY TRAINING AND FIELD APPLICATION FINAL REPORT

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# APPRECIATIVE INQUIRY TRAINING AND FIELD APPLICATION

## FINAL REPORT

JENNA LUCHE-THAYER

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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## Acronyms

AI	Appreciative Inquiry
AI-PRA	the fused approach developed in Madagascar
ANAE	Association Nationale pour les Actions Environnementales
ANGAP	Association Nationale pour la Gestion des Aires Protégées
CBNRM	Community-Based Natural Resources Management
CMP	Comité Multilocale de Planification
COAIT	Community Options Analysis and Investment Toolkit or COAIT
COBA	Communauté de Base
DAI	Development Alternatives, Inc.
ERI	Ecoregional Initiatives
FCER	Fianarantsoa Côte Est Railroad
GCF	Gestion Contractualisée des Forêts
GELOSE	Gestion Locale Sécurisée
INSTAT	Institut National des Statistiques
IRM	Innovative Resources Management
KH	Koloharena
LDI	Landscape Development Interventions
MECIE	Mise en Comptabilité des Investissements Environnementaux
M&E	Monitoring and Evaluation
NGO	Non-Governmental Organization
PA	Paysan Animateur
PACT	People Actively Collaborating Together
PCD	Commune Development Plan
PRA	Participatory Rural Appraisal (PRA)
PTE	Programme de Transition Ecorégional
PV	Paysan Vulgarisateur
USAID	United States Agency for International Development



## I. Introduction

The Ecoregional Initiatives (ERI) project is the first project in Madagascar to promote the understanding and practices of Appreciative Inquiry (AI) and the Community Options Analysis and Investment Toolkit (COAIT) with communities in its project zones and with its USAID Alliance Partners. ERI has committed to an assets-based vision that promotes recognizing and working with the strengths, values, resources, best practices and successes demonstrated by populations living in the project zones.

Appreciative Inquiry, studies using an assets-based analytical focus, Participatory Rural Appraisal (PRA) tools and the Community Options Analysis and Investment Toolkit are among the options and practices ERI will employ. AI is a highly flexible assets-based participatory approach that can be easily fused into a variety of development processes and activities - from PRA tools to commune planning to building programs for farmer field schools. COAIT is a participatory approach that puts heavy emphasis on building grassroots-level skills, e.g. ability to analyze environmental impact of livelihood practices and attribute values and revenue potential to renewable natural resources and conservation practices. The strengths of these methodologies easily combine with project activities and objectives to help meet **ERI's Intended Results:**

- An ecoregional approach to conservation and development is adopted and implemented by multiple actors in priority ecoregions,
- Community-based management of natural resources is improved and expands to protect the forest corridor,
- Profitable and environmentally sound farming systems replace slash and burn agriculture at a landscape scale,
- Rural associations achieve financial and organizational sustainability and become effective advocates for local concerns, and
- Strategic communication, education and outreach lead to widespread behavior change.

This assignment was largely focused on developing, testing and consolidating an assets-based approach to respond to Commune needs and that can be used by Commune staff for rural development in the contexts of the Mantadia-Zahamena and Ranomafana-Andringitra ecoregions of the Toamasina and Fianarantsoa Provinces. In addition, this assets based approach is fused with a variety of participatory methods and tools that encourage full Commune and Fokontany partnership in development planning and delivery. The process for developing this approach and its application intends to:

- To empower rural communities and communes to achieve greater self-reliance based on grasping existing opportunities and promoting independent decision-making and problem solving.
- To increase the capacity of ERI program staff and partners (including rural commune staff) to conduct assets-based, participatory rural appraisals.
- To improve the understanding and support of ERI program staff to rural communities and communes in the program's intervention zones.
- To render selected ERI program staff capable of training others (e.g., field agents, commune staff) in improved, assets-based, participatory rural appraisal techniques.
- To prepare a training module or series of sessions on improved PRA techniques based on AI and COAIT. Particular attention to: farming systems & agricultural techniques, village-level organizations & institutions, commune-level development needs, &

integrated natural resource management at the village territory scale & community resource mapping.

- To conduct general training in improved PRA techniques (AI and COAIT) for ERI program staff and partners.

The key product outcome of these training and field efforts was the team development of the **AI-PRA Guide**. The AI-PRA Guide manifests the ERI commitment to grassroots engagement and gender mainstreaming and will assist the project in improving Commune Development Plans. In addition to the Guide, the assignment provided ERI a wide and detailed menu of training materials for use in any number of capacity building efforts regarding AI, PRA and COAIT.<sup>1</sup>

This final report provides a summary of efforts completed to date, additional observations and examples and suggestions regarding how ERI might further integrate AI across the project activities.

## II. Guide Development

Participatory approaches are, by their very nature, context driven and open to constant innovations. It is very important to note that the AI-PRA Guide promotes a participatory and assets-based approach. The Guide is not a static ‘*step-by-step do this one way*’ set of directives. Therefore, any practices devised to address unusual circumstances and other innovations are welcome additions to the Guide.

The Guide describes an approach that fuses Appreciative Inquiry and Participatory Rural Appraisal. This approach will be replicated through training of trainers and subsequent field exercises throughout ERI project zones. In addition to the directions provided on how to conduct the AI-PRA approach, there is guidance provided on how to do the follow-up analysis. The analytical guidance follows the exercise guidance.<sup>2</sup> This fused approach was developed through a series of participatory processes and contributions by ERI staff and USAID Alliance members.

Initially, a workshop was held with ERI and its Alliance partners to familiarize all participants with the theory, concepts, principles and basic practices of Appreciative Inquiry. One result of this Workshop was “context definition.” In this case, the objectives and results modules of the ERI project focused the generation of core Appreciative Questions matched to selected PRA tools in order to bring about certain results, e.g. assist in revising Commune Development Plans (PCDs). The Discovery and Dream processes from Appreciative Inquiry were determined to be the best emphasis for this exercise. The workshop participants also decided that in order to better ensure good representation by age, gender, hamlets, villages and Fokontanys, and gain reliable information, it would be best to include the semi-structured interview techniques and focus groups.

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<sup>1</sup> At the time of this report, the COAIT Manual is still to be finalized by ERI sub-contractor Innovative Resources Management (IRM).

<sup>2</sup> Note the limits of this AI-PRA approach - the method can be characterized as qualitative and indicative and therefore other more quantitative sources of information should be sought to inform the project and improve the PCDs ; e.g. the development pathways tool.



With these parameters in hand, seven representatives from Alliance partner organizations – CARE, CRS, ADRA, CI, FCER, CMP, Voahary Salama and PACT- the ERI teams from Fianarantsoa and Toamasina and the consultant split into two groups to further contextualize this approach and test it within Fokontanany and Commune settings. The field-testing was not a limited academic or training exercise, but also a practical effort to meet project commitments and provide development services.

This field-testing provided the details and ground truthing needed to finalize the sequencing, substance and teamwork for future implementation of the AI-PRA approach. For example, how to proceed with semi-structured interviews was determined at the field level. It was found to be more effective for the semi-structured interviews to use topic-orientating, general open-ended questions before moving to specific appreciative questions.

Focus groups were formed at different times throughout the exercise. In some cases, focus groups separating youth and women were conducted at the end of each exercise to best ensure their views were included. In other cases, focus groups chose representatives to carry out certain analytical aspects of the exercises. At other times, it was very effective to form highly representative groups, e.g. having the participants move into age, gender and hamlet groups. All these group dynamic management practices resulted in more perspectives being heard on a regular basis and helped to reduce the phenomenon wherein a few “powerful” people tend to answer for the entire larger group.

A sense of humor and jokes seem to be very effective in sparking engagement. Jokes were particularly useful when getting people to participate in the Dream exercise, e.g. jokes describing dreadful situations - pickpockets everywhere. This “dream or nightmare” got an immediate laugh and response - many people quickly provided positive and productive ideas and hopes.

In both regions, the Wealth Ranking Matrix had to be revised to not use the word poverty. No one wanted to be considered poor – so kinds of wealth were described and listed – with some having more or less wealth.

Following the field exercises in Toamasina and Fianarantsoa, a one-day exchange sharing these two teams’ experiences and analysis helped to consolidate the approach and Guide. For example: the field exercise tested and implemented the AI-PRA approach at the Fokontany level. However, agreement and vision was still needed on: how to consolidate all Fokontany findings and facilitate the Communes through a process to improve their PCDs; on the definition of an improved PCD; and determining opportunities for partner coordination within these efforts. This was accomplished during the exchange and incorporated into the Guide.

Guidance for AI-PRA approach analysis draws from : (1) Result modules’ thematic questions generated by ERI; (2) findings provided by Fokontany populations; (3) additional observations derived from professional experience & knowledge of context; (4) an analysis of the PCD regarding stated potential for strengthening associations, managing natural resources, improving agricultural production & practices and generating revenue opportunities; and (5) the utilization of the Gender Matrix.

In order to best utilize the findings from the AI-PRA approach, special effort will be made to identify the strengths, best practices, elements of success, values, wealth and resources

discussed in the course of the exercise. Once these have been identified, the ERI team will analyze their potential for how the project can build on these assets and replicate or expand the successes. Specific details of the context of each Fokontany provide key information as to what, how and with whom the project will work. All recommendations should link directly back to those assets identified and the context details of how implementation can take place.

As noted earlier, there should be a brief synthesis on the status of the Commune Development Plan regarding its attention to, and opportunity for strengthening associations, managing natural resources, improving agricultural production and practices, and generating revenue opportunities. In addition, there should be some note as to whether the role of women has been accurately portrayed and if youth have been considered.

In the case of the Ambolilazana PCD, women's roles in agriculture are inaccurately portrayed. The very limited roles of women in the current PCD would misdirect ERI (and other projects') efforts in improving agricultural practices. Based on the inaccurate gender analysis, most of the training would go to men as the PCD states that men do the bulk of this work. In fact, married women commonly are the single head of households for more than half the year and men's presence at home is not necessarily linked to agricultural cycles.

Future applications of this Guide will include training of trainers for AI-PRA implementation; it will also serve as a 'memory aid' for the ERI team. Practical considerations of time and human resources will shape future exercises consisting of three-member teams, including ERI staff and Koloharena counterparts, and the analytical phase for the report write up will take place after all selected Fokontanys in the chosen commune have been engaged.

Perhaps the most important outcome of the field test was that long-time practitioners of PRA found that fusing an AI approach led to new and better results. These results included: population groups that became increasingly proud of their accomplishments and strengths and understanding that they are partners and leaders in their own development, and a project that is better informed regarding how to work with whom in support of what values and strengths and identified elements of success.

### **III. Additional Opportunities for AI Application in ERI**

AI is a practical application of the hypothesis that, "*Inquiry into the true, the good, the better, the possible will lead to faster, more democratic and energized change than will deficit-based inquiry into the broken and problematic.*" AI is a flexible practice and approach that has been used in many professional fields apart from development. For example, the wide application of AI includes use by: the private sector to improve productivity and non-profit organizations for institutional assessments and organizational reform.

As stated in this assignment's training materials and other AI sources, "*The many activities, steps, and applications of AI are uniquely different in each situation.*" In this regard, the five generic processes for AI<sup>3</sup> and the five steps of AI – Define, Discover, Dream, Design and

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<sup>3</sup> (1) Choose the positive as the focus of inquiry, (2) Inquire into stories of life-giving focus, (3) Locate themes that appear in the stories and select topics for further inquiry, (4) Create shared images for a preferred future; and (5) Find innovative ways to create that future.

Deliver – **can be integrated into any and all ERI efforts.**

AI Phases	
<b>Defining</b>	the focus of the overall inquiry
<b>Discover</b>	Searching for the best of what IS; appreciating that which gives life: Identifying strengths, resources, assets, values, and wishes for the future.
<b>Dream</b>	Envision the ideal of what might be; envision impact: (based on analysis from the previous stage)
<b>Design</b>	Co-construct the future; reach consensus on what should be; Designing the systems and processes that will carry the Dream forward to the future.
<b>Deliver</b>	Experience what can be. Implement action that builds upon the strengths, resources, assets, and values of the past and present, and leads toward the wishes for the future.

It should be noted that USAID Alliance partners who participated in the AI-PRA Guide development understood the flexibility and utility of AI. They were asked if they wished to send messages to USAID during the April 2005 assignment debriefing. Among the messages were: USAID should promote AI throughout Madagascar; All Alliance partners should be trained in AI; and All USAID projects should integrate AI. These endorsements underscore the understanding that AI can be widely applied by ERI, as well as other development partners and projects. For example, the AI Define and Discovery process has been used for a number of analytical, learning, training, monitoring and evaluation activities. The AI Dream Phase is very effective for moving any planning process along. The Design Phase transforms dreams into feasible actions tied to short, medium and long term timeframes with recognized and attributed resources, skills and responsibilities.

As stated, the initial scope of work focused largely on fusing AI and PRA for grassroots engagement, and analysis and improvement of the Commune development plans. However, **the application of AI within the wide range of ERI activities and objectives is virtually limitless.**

Furthermore, application of AI across ERI activities will assist the project in identifying existing assets and strengths that will help to meet results commitments. Therefore, it is up to ERI to finally determine the limits in resources and time that impinge upon full AI application.

The following examples illustrate some of the potential ERI AI applications. It is understood that all the examples provided assume ERI's commitment to excellence in analysis and implementation. The suggestions provided do not mean to indicate a lack in ERI's design or Workplan's thoughtfulness or intention. The examples and suggestions simply state the obvious regarding how AI can be harnessed by ERI to focus on and discover the best that is.

### **III. 1. The AI-PRA Guide Supports the Activity Implementation Fund**

A series of Appreciative questions are listed in the AI-PRA Guide that could be further developed to assist in the Activity Implementation Fund (AIF) analysis required for selection of activities. AI could be applied in the development of the clear selection criteria, as

important factors will include - the possibility for replication and the determination of existing initiative, assets and strengths that the project complements with the AIF.

For example, the AI-PRA approach has already generated a number of analytical appreciative questions and tools that could be directly applied to this landscape analysis related to **reducing environmental degradation** and improving agriculture and natural resource planning. The AI-PRA Guide Discovery phase has developed a series of Appreciative Questions related to motivations, practices and values regarding “best community natural resource management practices” that could be further expanded. The Guide also included questions related to **Increasing productivity, e.g.**, increasing the long term productivity and profitability of farm livelihoods activities.

There is great need and opportunity for ERI to include the AI perspective in order to succeed in farm and forest level enterprises, increase access to improved production technologies and practices, **increase competitiveness**, or **improve the enabling environment**. ERI staff and certain Alliance partners should be able to apply their understanding of AI in assessing these opportunities and screening potential activities from the AI perspective.

However, further development of critical Appreciative Questions and the related grassroots discovery process are needed for communities to understand how poverty is linked to deforestation and discover which poverty alleviation activities also instill practices of forest conservation. For example, INSTAT studies note that forest conversion rates are the highest in the areas along the southeast corridor of the Ranomafana – Andringitra forest corridor and that *“loss of lowland tropical forests will continue unabated unless new agricultural markets and income generation opportunities are developed.”* These kinds of findings can be the basis for defining the focus of the Appreciative Questions. The learning process has many avenues; these questions can be integrated into the Commune AI-PRA Guide approach, as well as the communications strategy and farmer field school trainings.

### **III. 2. Meeting Strategic Challenges by Integrating AI**

Familiarity with AI among members of the Ecoregional Alliance/USAID, and other partners will help ERI and partners to identify and build upon best practices, successes, existing assets and strengths. The related outcomes of this approach and analysis will:

- better ensure sound use of limited resources and relatively expensive interventions in the forest corridors in Fianarantsoa and Toamasina provinces; and
- **Unify** “*independent actors who are motivated by different and in some cases potentially conflicting agendas*” **through a team-building approach** wherein AI Dream and Design (Co-construct the future) phases are used for more effective ecoregional planning.

Appreciative Questions could be defined and developed to maintain the vision and analytic breadth required for tracking broader influences on resource use and then integrated into ERI monitoring and or partner review processes.

Building AI into the Koloharena activities would assist in determining those successes that would help to expand the Koloharena movement. The AI phase of Defining of the focus – through questions and process - could systematically dovetail the environmental ethic into the

expansion process. Such questions and monitoring efforts would need to be standardized in order to promote these combined objectives.

### III. 3. Planning Activities

ERI will support numerous planning activities under its various modules. For example, the ERI Annual Workplan 2004 -2005 **Module 1:** “Ecoregional Approach to Conservation and Development Adopted and Implemented by Multiple Actors in Priority Ecoregions, *Component 3: Increase the capacity to access and utilize information and planning tools within the ecoregion,*” notes AI integration into planning tools.

Under this *Outcome:* The ERI program will offer new tools and orientations to complement the existing analytical tools, e.g. the *Cahiers de Ménagement* a longitudinal data base covering six years of highly detailed information on rural incomes, revenues, and production choices. This includes Appreciative Inquiry and Development Pathways approaches that build on the experience LDI gained in using participatory rural appraisals for analysis and local-level planning. The Workplan states that AI will “*assist the regional and commune level decision makers to make more informed choices on how to promote regional and local economic growth poles sensitive to environmental considerations.*”

As noted previously, the AI Dream Phase is very effective for moving any planning process along. The AI-PRA Guide provides a series of process steps that could be applied to many planning activities and provides specific guidance for facilitating commune level decisions. These process and decision-making steps can be applied to a number of planning and coordinating activities at the commune and regional level.

### III. 4. Revising Analysis to Seek and Replicate Elements of Success

The next example underscores how **good analysis can be changed from caveats into action opportunities** with AI integration. This is done by applying the five generic processes of AI: (1) Choose the positive as the focus of inquiry, (2) Inquire into stories of life-giving focus, (3) Locate themes that appear in the stories and select topics for further inquiry, (4) Create shared images for a preferred future; and (5) Find innovative ways to create that future.

The following text is excerpted from the ERI Annual Workplan 2004-2005 and states key regional economic situation findings from the Landscape Development Interventions (LDI) and Programme de Transition Ecorégional (PTE) programs,

*“These previous programs showed that rural behaviors change toward protection and sustainable use of natural forests occurs when rural communities gain the rights and associated responsibilities to manage their own community forest lands. But this condition is not sufficient to arrest forest conversion unless food security and household incomes increase sufficiently to counter pressing and immediate threats to livelihood. Slash-and-burn agriculture associated with forest conversion cannot be stopped unless economic growth and rural development respectful of the environment occurs in communities along the forest corridor. Unless food security, improved household incomes, and better health for family members is attained in the immediate future, rural populations along the forest corridor will not adopt new agricultural practices and technologies.”*

By applying the AI generic process, this foundation analysis could be revised into an AI perspective in order to better uncover the *true, the good, the better, the possible that will lead ERI to faster, more democratic and energized change.*<sup>4</sup> A sample of this initial reorientation follows:

- Rural populations adopt sustainable practices that are more protective of natural forests when they gain the rights and associated responsibilities to manage their own community forest lands.

*Define and discover examples of protective and sustainable practices and examples of rights-and-practices-links for replication. Note the innovations that created the new reality/future.*

- Forest conversion/tavy is arrested when activities to improve food security and household incomes address livelihood threats.

*Detail those stories that gave life-giving focus and then name successful activities.*

- Economic growth in communities along the forest corridor results in a willingness to limit or stop tavy.

*Define and discover economic growth activities.*

- Rural development, respectful of the environment, results in communities willing to limit or stop tavy.

*What is the mix of elements of success and stories that define this rural development?*

- Rural populations along the forest corridor are willing to adopt new agricultural practices and technologies that demonstrate links between these new practices and food security, improved household incomes, and better health for family members.

*How were these successes or links identified and demonstrated in other development activities and then applied to agricultural practices?*

### **III. 5. Transforming the Monitoring and Evaluation Process**

As noted, the AI Define and Discovery process can be used for almost any analytical, learning, training, monitoring and evaluation activity. Application of AI can move the processes related to the Monitoring and Evaluation Plan from a data collection and management tool to an **imbedded best practices learning cycle**, wherein the *best of what is* is immediately highlighted and then replicated. For example, appreciative questions and discovery/analytical process could be integrated into the monitoring activities related to the Cahiers de Ménagement in order to assess what types of interventions generate the greatest economic benefit to rural communities.

In other cases, elements of success can be imported to other ERI results modules. For example, learning from how “Communes adopt environmentally sound development plans (Module 1)” could be immediately applied to ecoregional coordination thinking. Building upon past success could be reinforced by AI application in the monitoring the 260 Koloharena associations established in Fianarantsoa during the LDI program. The AI self learning and training aspects in this monitoring process could be capitalized upon by having

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<sup>4</sup> The ERI Workplan does provide some examples of activities that will address these caveats. This final report sample is meant to illustrate how analysis can be revised from its conception to integrate AI.

these numerous “aware and trained” Koloharena members lead with best practices across the ERI project ecoregions.

#### **An Example of M&E Transformation**

The Toamasina ERI Communications Specialist integrated an appreciative inquiry approach into an “evaluation” exercise for determining Koloharenas’ *Paysans Vulgarisateurs*’ (PVs) effectiveness in passing messages to farmers. This resulted in a significant **reorientation** of the evaluation into an ERI and PV learning process - or AI Discovery phase.

Together they discovered their best practices and successes and how certain values resonated in particular messages. They reviewed a number of key communications elements including the message content, timing of transmission, and communications style in order to analyze the “why, how, what and with whom” or context of these elements of success. This learning will now be applied to other messages.

### **III. 6. Broadening AI to Discover and Apply the Best Across the Nation, the Regions and the Communities**

The following examples show how AI applied to national, regional and community level research can uncover context information that might be relevant for innovation and application in both ERI project ecoregions.

#### **National Discovery**

Rather than looking specifically to those conditions and practices found in the ecoregions of the two provinces, a nation-wide Discovery process, facilitated by the knowledge, understanding, and experience of the Alliance partners might uncover suitable practices and successes for use in these corridors. For example, a lack of local examples of success related to *‘mitigating the expansion of agriculture into the few remaining basfonds or biologically diverse wetlands that are the habitats of many endemic bird species’* around the western confines of the Ranomafana National Park, could be overcome by borrowing successes from alternate ecoregions in Madagascar. Examples of incentives and changes that move populations from extractive enterprises to revenue-generating alternatives in agricultural production might be found in one of the two ERI provinces or borrowed from other regions in Madagascar. Mining is an activity common to many areas of Madagascar. The same effort of broad Discovery could assist in determining why and how communities decided to stop any environmentally degrading practice, including mining; these elements of success could be applied to the biologically rich areas of the corridors found in Fianarantsoa and Toamasina.

#### **Regional Discovery**

It is widely recognized that farmers use *tavy* or slash and burn as the way to gain arable lands. However, the Toamasina AI-PRA field test noted that some farmers had begun to conserve land use by implementing intensive agricultural practices, e.g. irrigated paddy rice and multi cropping, in their current fields rather than immediately accessing more fertile soil through *tavy*. Better understanding of the motivations, values and forces behind why these farmers shifted from the practice of *tavy* to investing labor and changed practices in land conservation is a critical set of elements of success. These elements of success need to be unpacked and integrated into the ERI messages and support for agriculture practices in both ecoregions. As noted in the ERI Workplan 2004-2005, some analysis <sup>5</sup> has shown that enabling conditions, e.g. road infrastructure and market access must be addressed in order to move away from

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<sup>5</sup> Cahiers Terre-Tany/BEMA, No. 3. 1998. Une expérience de synthèse environnementale.

tavy practice. Identifying and strengthening these elements of the farming system and elements outside of the agricultural system, provide alternatives to tavy. For example, ‘*concentrating on perennial tree crops and links to lucrative markets represents a significant opportunity.*’

The Toamasina AI-PRA field exercise discovered a local practice that corrected Maladie de Panama, the bacterial disease reducing yields in banana production. The farmers in Toamasina destroy the infected plants and do not plant bananas in that physical area for three years. After three years the new banana crops are healthy. This non-labor intensive and non-external input approach could be shared and applied throughout the project ecoregions. Another Toamasina discovery that might have ecoregional implications: following the collapse of the international price for coffee, some communities have begun to plant and sell cloves and vanilla as cash crops. Understanding these changes, in order to support such changes, could be applied in both regions.

### **Community Discovery**

For example, “*ERI will continue to work with local communities to capture water flowing out of the corridor to be used for irrigated agriculture, potable water systems and small-scale hydroelectric power. Community-based resource management agreements (GCF) will be put in place to protect the streams and springs providing water of great economic value.*”

Elements of success from these **valorization experiences** can be applied to any number of conservation efforts e.g. modification of fishing and shrimping activities to conserve stock and generate long-term revenue.

AI questions that Define and Discover why there is ongoing community resistance and antagonism to the Ranomafana National Park, or who gains control of those valuable rice fields lost due to rural indebtedness need to be incorporated into activity selection and planning. Analysis of the values behind these practices might better indicate how motivations - based on revenue, livelihoods and values - could be integrated into the activities that address complex changes. Another opportunity for community Discovery would be the identification of specific successes or elements of success from Association Nationale pour les Actions Environnementales (ANAE), Association Nationale pour la Gestion des Aires Protégées (ANGAP), and LDI interventions in the villages situated in the buffer zones of the Ranomafana National Park that could be replicated more broadly in the Fianarantsoa ecoregion and applied to the Toamasina ecoregion.

### **III. 7. Examples of AI Integration into Module Activities**

This last section of *opportunities for AI integration* will select samples from the numerous ERI activities and indicate how AI can be utilized.

**Under Module 1:** Ecoregional Approach to Conservation and Development Adopted and Implemented by Multiple Actors in Priority Ecoregions, the **Forest Zoning of the Corridor** *outcome:* Integration of AI into the zoning process could identify, acknowledge and integrate locally generated best practices. This discovery and dialogue would assist in building grassroots buy-in for the final products, e.g. the maps determining what types of land use practices will be allowed to occur in different parts of the forest corridor.



**Forest Corridor Management Plan** *outcome:* ERI will provide technical and direct material assistance to these planning bodies to facilitate the incorporation of an environmental perspective into regional strategies and plans in order to achieve a revised management plan that is validated among the membership of the Comité Multilocale de Planification (CMP - communes, regional authorities, project members). As with the commune development plans, the ERI technical packages for planning could integrate the AI approach. Furthermore, AI can be fused into institutional assessments for CMP evaluations regarding the meeting of targeted work plan objectives and activities.

**Ecological and Socio-economic Monitoring of Forest Corridors** *outcome:* As noted, AI can transform all M&E activities, such as the corridor monitoring initiative, into a training and learning process.

A selection of success stories discovered by state-of-the art maps, spatial analysis tools and initiatives such as Development Pathways and the Zonage Forestier could highlight their usefulness. Appreciative questions could be generated to help guide the Province of Toamasina and pilot communes in the use and applicability of these state-of-the art maps and the spatial analysis tools for the revision of communal plans. Use of AI group processes, adherence to representative and indicative information gathering and other participatory techniques can help ERI to achieve an ecoregional vision that is supported by the Toamasina Province, the three new regions, and the key communes.

**Under Module 2 :** Community Based Natural Resource Management Improved and Expanded to Protect Forest Corridors, both *Component 1: Improve local understanding and implementation of Gestion Locale Sécurisée/Gestion Contractualisée des Forêts (GELOSE/GCF) processes and Community-Based Natural Resources Management (CBNRM) practices and Component 2: Enhance the technical assistance, administration and strategic resource allocation of Malagasy institutions involved in the transfer process,* will use AI to analyze and discover how certain segments of rural communities overcame exclusionary GCF rules and/or the processes that were employed to ensure that all segments of rural communities participated in the development of the GCF contracts and gained economic benefits. This analysis will be integrated into current contracts, the training programs to reinforce the capacity of the COBA to manage existing GCF/GELOSE contracts and into student internships.

**Under Module 3 :** Productive and Environmentally Sound Farming Systems Replaced Slash-and-Burn Agricultural Practices at the Landscape Scale, ERI technical teams will be developing technical position papers describing potential interventions for each agorecological niche. These policy papers *'will summarize planned actions based on assessments of the current best practices known from experience, applied research, and observation of successful cases in Madagascar and the recommendations must pass through a rigorous analytical screen that judges appropriateness from an environmental, economic, and cultural perspectives and in turn these packages of techniques must be validated by the Koloharena farmer-led extension agents before they are rolled out for widespread extension.'* AI familiarity and/or training of the various actors engaged in this complex process will assist in generating innovations based on successes that **have been locally tested** prior to ERI expansion.

*Component 2: Enhance producer capacity to maximize profits and meet market quality, volume and scheduling requirements* outcomes will include a systematic assessment of

opportunities and needs and subcontracts with specialist NGOs/consulting firms to provide Koloharena and other farmer organizations training in various business skills. AI guidelines to these subcontractors could include a stated demonstration that such training has **context – specific successes and has shown to be flexible for innovation in various ecoregions.**

*Component 3: Improve food security, nutrition and overall health* outcomes state that ERI communications and environmental education specialist will work with health partners through the USAID SantéNet project and Voahary Salama network to design integrated health, population and environment messages that promote simple yet effective ways for all family members to improve their living conditions. Alliance Partners, e.g. Voahary Salama, trained during this assignment in the AI-PRA approach, are committed to expanding the approach to integrate population-health-environment considerations and activities.

**Under Module 4 :** Rural Associations Achieve Financial and Organizational Sustainability and Become Effective Advocates for Local Concerns - all Koloharena learning exchanges could use AI as part of the selection criteria. For example, are the chosen Koloharena trainers able to identify the elements of success and the underlying values and strengths that contributed to these success stories? Are the practices replicable because they are based on existing and available strengths, competencies, skills and assets? Do the practices have the flexibility to be innovated according to different contexts or needs?

Under *Component 3: Develop advocacy and negotiation skills of rural associations by strengthening linkages with civil society organizations* outcomes, it is stated that “*the Development Pathways and Appreciative Inquiry tools will serve as the foundation for helping actors at the commune level to clarify visions and lobbying positions.*” Specifically, ERI could share the commune analysis from the AI-PRA studies and the recommendations for the revised PCDs with the Koloharena members, then walk them through the Dream, Design and Delivery phases to facilitate their setting of feasible advocacy goals relevant to commune and regional development objectives and activities. ERI can inform regional and national decision makers that this process, practiced by Koloharenas, makes them informed and relevant decision-making partners in matters that will affect local communities. Informed rural associations, which share a common vision and advocacy goals will be capable of effectively conducting negotiations and defending their interests. ERI could also facilitate inter- and intra-ecoregional Koloharena meetings that use Dream and Design in order to assist in the confederation process and consolidating advocacy goals for the national arena.

**Under Module 5 :** Strategic Communication, Education, and Outreach Lead to Widespread Behavior Change, Component 1: *Improve rural associations’ ability to develop and deliver integrated development messages*, a previously noted M&E example illustrated how AI can improve Koloharena’s communications’ skills.

**Farmer-led Agricultural Extension or Farmer Field Schools could use the AI learning-exchange selection criteria detailed under Module 4.** For example, are the chosen farmer peer trainers able to identify the elements of success and the underlying values and strengths that contributed to these success stories? Are the practices replicable because they are based on existing and available strengths, competencies, skills and assets? Do the practices have the flexibility to be innovated according to different contexts or needs? In addition, these selection criteria could be expanded to sensitize trainers to the obstacles and opportunities for reaching and engaging youth and women. Specific success stories that show how women and

youth participated and benefited from new practices could be a showcase item in training and communications.

Farmer field schools can emphasize experimentation and a coordinated diagnostic process that seeks elements of success in each case study for application to other practices. Instead of using a problem solving approach, emphasis on identifying and understanding the values, strengths and existing assets can be used to innovate practices that are feasible for rural populations. AI should be used to explore possible ways in which these farmer-trainers can be supported by communities over the long-term, e.g. by borrowing from the elements of success found in Fokontanys that support their own school teachers without outside assistance.

#### **IV. Future Use of COAIT**

COAIT is a participatory approach that puts heavy emphasis on building grassroots-level skills, e.g. ability to analyze environmental impact of livelihood practices and attribute values and revenue potential to renewable natural resources and conservation practices. COAIT builds community capacity to analyze costs, benefits and risks of all development options that may be available. Steps or phases in the process include stakeholder identification, institutional assessment, participatory resource mapping, and natural product inventorying. The final stage of the process targets the enhancement of community skills needed to conceive and market a local development prospectus or proposal.

How ERI will integrate COAIT is still to be decided. Unfortunately, time constraints did not permit an in-depth analysis of how COAIT might be utilized by ERI and its Alliance partners. The greatest constraint regarding ERI's use of COAIT is its emphasis on being a holistic and integrated approach and not a box of tools and techniques of which any might be available for context application. However, during the April Exchange Workshop, partners and ERI teams saw scope for the application of a number of distinct COAIT tools.

For example, ERI plans to utilize the MECIE and USAID Environmental Impact Assessments and other environmental impact tools to foster better understanding of environmental dimensions of planned interventions and “*help determine the potential ecological impact of rural development activities planned by local communities situated along the environmentally sensitive forest corridor.*” These assessments are largely geared for development practitioners and government use.

The COAIT Manual illustrates a number of participatory process and environmental impact matrices that can be easily implemented and understood at the grassroots. In addition, there are a number of COAIT activities that help to valorize natural resources and show their importance in agricultural livelihoods. All such grassroots-gearred matrixes and tools would greatly benefit ERI efforts to promote the buy-in and understanding needed to shift to conserving natural resources. These selected exercises and tools could be field-tested and integrated into the AI-PRA approach or used in a series of discreet conservation and valorization exercises.

In addition to this grassroots application of COAIT, participants in the Exchange Workshops said that the scale of COAIT *terroirs* and related analysis and planning might well support regional coordination among the Alliance members. However, many of the participants said

that most of the regional-scale activities described in COAIT were already being implemented by numerous Alliance partners and the Government of Madagascar.

## **V. Additional Observations**

As requested, I have tried to detail some rapidly gathered (and untested) observations unique to the forest corridor area I visited in Madagascar. This uniqueness is qualified as “different” from the experiences I have had in many countries throughout Africa, Asia and the Near East.

The most striking condition was the apparent under-utilization and under-management of a rural landscape that is relatively rich with available arable land, water and natural food sources. People did not make regular use of such abundance. For example, running water is readily available throughout the corridor, yet hygiene practices such as daily bathing and the washing of clothes is not common. Food oils are also readily abundant, yet few of these resources were tapped to extract oils; oils were mostly purchased. Lack of oil in the diet seemed to be one of the causes of the malnutrition I saw in the Toamasina Fokontany. There appeared to be little use of the ready resources to make soap, or regularly repair homes. Villagers acknowledged practices of over-fishing and over-shrimping, yet did not modify behavior even though they resulted in a significant loss of shrimp revenue and protein sources.

It may be that the second striking condition - loose social cohesion - I observed in this area undermines social and work organizing and use of resources. Unlike many countries where rural communities lose men on a cyclical basis in their search for income work; adult men in this area are absent sporadically throughout the year (in search of new women sex partners). Their wives do not know when they will return and therefore cannot depend upon them for any key labor or child-rearing activities. Many young women sporadically leave for urban areas to gain money and goods through transactional sex; this does not appear to have social consequences. There were some examples of group cooperation, e.g. building a school. However, the regular need for agricultural labor did not result in cooperative labor exchanges; those persons that could afford it paid for additional labor. There did not seem to be group enterprises of any nature. The irregular coming and going of many segments of rural society might be one reason why there is little consistent mobilization for revenue, agricultural productivity, raising families or investing in communities.

The third observation, was not entirely unique, but should be noted. Cash crops that had lost value (coffee) have been largely replaced by sugar cane for illegal rum production and sales, rather than other legal cash crops such as cloves. Apparently, it is easier to distribute and sell rum than cloves as rum has a strong local market, whereas cloves are an export market. This example illustrates some very telling dynamics with regards to revenue and markets and local agricultural production choices.

These observations have been shared as they indicate some particular challenges for the ERI project. According to the Fianarantsoa ERI team members, some of the Toamasina conditions I described are less striking in their area. However, better understanding as to why there is resource under-utilization and low levels of social cohesion might be extremely important for reaching ERI project goals.

## **VI. Summary and General Recommendations**

AI is a flexible practice and approach that has been used in many professional fields apart from development. For example, the wide application of AI includes use by: the private sector to improve productivity and non-profit organizations for institutional assessments and organizational reform. The five generic processes for AI and the five steps of AI – Define, Discover, Dream, Design and Deliver – can be integrated into any and all ERI efforts. The application of AI within the wide range of ERI activities and objectives is virtually limitless.

For example, the AI Define and Discovery process has been used for a number of analytical, learning, training, monitoring and evaluation activities. The AI Dream Phase is very effective for moving any planning process along. The Design Phase transforms dreams into feasible actions tied to short, medium and long term timeframes with recognized and attributed resources, skills and responsibilities. Furthermore, application of AI across ERI activities will assist the project in identifying existing assets and strengths that will help to meet results commitments. Therefore, it is up to ERI to finally determine the limits in resources and time that impinge upon full AI application.

USAID Alliance partners who participated in the AI-PRA Guide development understood the flexibility and utility of AI. They were asked if they wished to send messages to USAID during the April 2005 assignment debriefing. Among the messages were: USAID should promote AI throughout Madagascar; All Alliance partners should be trained in AI; and All USAID projects should integrate AI. These endorsements underscore the understanding that AI can be widely applied by ERI, as well as other development partners and projects.

Perhaps the most important outcome of the AI-PRA Guide team work was that long-time practitioners of PRA found that fusing an AI approach led to new and better results. These results included: population groups that became increasingly proud of their accomplishments and strengths and understanding that they are partners and leaders in their own development, and a project that is better informed regarding how to work with whom in support of what values and strengths and identified elements of success.

The AI-PRA Guide was developed through a peer-learning, context-driven team process and promotes a participatory and assets-based approach. The Guide is not a static '*step-by-step do this one way*' set of directives; any innovations are welcome additions to the Guide. Future applications of this Guide will include training of trainers for AI-PRA implementation. Practical considerations of time and human resources will shape future exercises consisting of three-member teams, including ERI staff and Koloharena counterparts. The analytical phase for the report write up will take place after all selected Fokontanys in the chosen commune have been engaged.

### **Recommendations**

- 1) ERI has committed to improving 37 PCDs, 12 in Fianarantsoa and 25 in Toamasina. In order to improve the PCDs and implement the subsequent activities in a timely manner, it is recommended that:

Year one of the project should implement a comprehensive AI-PRA TOT of Koloharena PVs and PAs living near the selected Communes so that the three -person AI-PRA teams can be fielded and complete their PCD improvements in all 37

Communes by the end of Year three. In each case, the AI-PRA team should have one ERI professional to participate in the exercises for both quality oversight and authoring of the final analysis.

- 2) Appreciative Questions listed in the AI-PRA Guide could be further developed to assist in the Activity Intervention Fund (AIF) analysis required for selection of activities. AI could be applied in the development of the clear selection criteria, as important factors will include - the possibility for replication and the determination of existing initiative, assets and strengths that the project complements with the AIF.
- 3) There is great need and opportunity for ERI to include the AI perspective in order to succeed in farm and forest level enterprises, increase access to improved production technologies and practices, **increase competitiveness**, or **improve the enabling environment**.
- 4) Further development of critical Appreciative Questions and the related grassroots discovery process are needed for communities to understand how poverty is linked to deforestation and discover which poverty alleviation activities also instill practices of forest conservation.
- 5) Familiarity with AI among members of the Ecoregional Alliance/USAID, and other partners will help ERI and partners to meet Strategic Challenges.
- 6) The AI-PRA Guide provides a series of process steps that could be applied to many planning activities and provides specific guidance for facilitating commune level decisions. These process and decision-making steps can be applied to a number of **planning and coordinating activities** at the commune and regional level.
- 7) Revise the conception of analyses' terms of reference to seek, import, innovate and replicate Elements of Success.
- 8) Apply AI into Monitoring and Evaluation efforts – e.g. the M&E Plan - to transform them from a data collection and management tool to an **imbedded best practices learning cycle**, wherein the *best of what is* is immediately highlighted and then replicated.
- 9) Broaden AI to discover and apply the best across the nation, the regions and the communities.
- 10) *'Help actors at the commune level to clarify visions and lobbying positions'*  
Specifically, ERI could share the commune analysis from the AI-PRA studies and the recommendations for the revised PCDs with the Koloharena members, then walk them through the Dream, Design and Delivery phases to facilitate their setting of feasible advocacy goals relevant to commune and regional development objectives and activities. ERI can inform regional and national decision makers that this process, practiced by Koloharenas, makes them informed and relevant decision-making partners in matters that will affect local communities. ERI could also facilitate inter- and intra-ecoregional Koloharena meetings that use Dream and Design in order to assist in the confederation process and consolidating advocacy goals for the national arena.

11) Strengthen Farmer Field Schools

Farmer field schools should emphasize experimentation and a coordinated diagnostic process that seeks elements of success in each case study for application to other practices. Instead of using a problem solving approach, emphasis on identifying and understanding the values, strengths and existing assets can be used to innovate practices that are feasible for rural populations. AI should be used to explore possible ways in which these farmer-trainers can be supported by communities over the long-term, e.g. by borrowing from the elements of success found in Fokontanys that support their own school teachers without outside assistance.

Train farmer-peer trainers able to identify the elements of success and the underlying values and strengths that contributed to successful (stories) practices. Choose practices that are replicable because they are based on existing and available strengths, competencies, skills and assets. Choose practices that have the flexibility to be innovated according to different contexts or needs. Sensitize farmer trainers to the obstacles and opportunities for reaching and engaging youth and women. Specific success stories that show how women and youth participated and benefited from new practices could be a showcase item in training and communications.

12) The COAIT Manual illustrates a number of participatory process and environmental impact matrices that can be easily implemented and understood at the grassroots. In addition, there are a number of COAIT activities that help to valorize natural resources and show their importance in agricultural livelihoods. All such grassroots-gear matrixes and tools would greatly benefit ERI efforts to promote the buy-in and understanding needed to shift to conserving natural resources. These selected exercises and tools could be field-tested and integrated into the AI-PRA approach or used in a series of discreet conservation and valorization exercises.

13) There are some particular “cultural and attitudinal” challenges for the ERI project. Better understanding as to why there is resource under-utilization and low levels of social cohesion might be extremely important for reaching ERI project goals.

## Annex 1

### COORDONNEES DES PARTICIPANTS A L'ATELIER D'ECHANGE du 31 MARS au 02 AVRIL 2005

NOM ET PRENOMS	FONCTION ET ADRESSE E-MAIL	RAISON SOCIALE ET TELEPHONE
LUCHE-THAYER, Jenna	Consultant, <a href="mailto:jiennaluche@msn.com">jiennaluche@msn.com</a>	3400 110th Place, VERO Beach, FL 32963 USA
ERDMANN Tom	<a href="mailto:tom_erdmann@dai.com">Coordonnateur Régional Programme ERI tom_erdmann@dai.com</a>	ERI Program, Villa Fanantenana V. BP 587 Bd Labourdonnais Toamasina 501. tél : 53 348 86  033 14 994 41
RAMANASE Zoely	<a href="mailto:zramanase@usaid.gov">Gestionnaire de Programme ERI – USAID zramanase@usaid.gov</a>	USAID, 6è Etage au ZITAL Ankorondrano Antananarivo Tél : 22 539 20
Ndranto		USAID, 6è Etage au ZITAL Ankorondrano Antananarivo Tél : 22 539 20
ANDRIANARY Etienne Daniel	Responsable de l'appui aux institutions rurales  <a href="mailto:EDA@dai.com">EDA@dai.com</a>	ERI Program, Villa Fanantenana V.  Bd Labourdonnais Toamasina 501. tél : 53 348 86
ANDRIANARIJAONA Jean Joseph	Agent de terrain	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
ANDRIANARIVELO Aivo H.	Directeur Régional <a href="mailto:ahandrian@crs.mg">ahandrian@crs.mg</a>	Catholic Relief Services Toamasina . tél : 53 343 99



RAZANAJATOVO Salohy	Responsable Suivi-Evaluation et communication <a href="mailto:Salohy_Razanajatovo@dai.com">Salohy_Razanajatovo@dai.com</a>	ERI Program Fianarantsoa . tél : 75 510 21 032 40 353 64
RAMAROLAHY Heriniaina Félix	Agent de terrain	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RASON Solofohery Davida	<a href="mailto:Responsable.en.Intensification.Agricole.dar@dai.com">Responsable en Intensification Agricole dar@dai.com</a>	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RAKOTONDRAZAKA Harimanana Mamy	Responsable Gestion Communautaire des Ressources Naturelles <a href="mailto:MAR@dai.com">MAR@dai.com</a>	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RAZAFINDRABOTO Etienne Marie Sylvain	Responsable Socio-Organisation	Projet FCER/Port Immeuble tranon'ny Trondro-Anjoma Fianarantsoa . tél : 75 507 02/0331290562
RAZOHERISON Charlier Daniel	Consultant - Planificateur	FIANTSO/ARC Antenne Fianarantsoa Tél : 75 519 82
RAMESON Andrianavalontseheno Hariniaina	<a href="mailto:hrameson@conservation.org">Capacity Building Manager hrameson@conservation.org</a>	Conservation International Moramanga Tél : 56 822 84
RANDRIANARISON Haja Guy	Responsable de l'appui aux institutions rurales <a href="mailto:HGR@dai.com">HGR@dai.com</a>	ERI Program Fianarantsoa Tél : 75 510 21
RAHARILAZA Viviane Nathalie	<a href="mailto:Gestionnaire.des.ressources.regionales.nat.rahar@netclub.mg">Gestionnaire des ressources régionales nat.rahar@netclub.mg</a>	Ny Tanintsika (Voahary Salama) Fianarantsoa Tél : 75 512 43

RAMAHEFAHARISON Andrianjatovo H. Denis	Responsable IEC et développement régionales  <a href="mailto:Voahary.Salama@netclub.mg">Voahary Salama@netclub.mg</a>	Lot VC 99 Ambohidahy Antananarivo  Tél : 22 678 00
RAZAFINARIVO Bakovola Anna	<a href="mailto:Formateur.des.animateurs.villageois@netclub.mg">Formateur des animateurs villageois a neny@netclub.mg</a>	Voahary Salama SAF/FJKM Moramanga  Tél : 56 822 50 / 033 14 158 85
RANARIVELO Andrianivoson Navalona	Agent ERI à Andranobolaha	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RALAIVAO Jean Michel Philibert	Responsable de la Commission appui aux communes et inter-communal	CMP Besorohitra Fianarantsoa
ANDRIAMANARIVO Niaina	<a href="mailto:Conseiller.Technique.en.Agriculture@crs.mg">Conseiller Technique en Agriculture landriam@crs.mg</a>	Catholic Relief Service Antananarivo Madagascar  Tél : 22 206 66
RAHARINOMENJANAHARY Vololoniaina	Responsable de la Gestion Communautaire des Ressources Naturelles  <a href="mailto:vl@dai.com">vl@dai.com</a>	ERI program Fianarantsoa  Tél : 75 510 21 / 032 02 522 37
DELAHAYE Paulette Alice	Responsable de la documentation  <a href="mailto:alice@pact.mg">alice@pact.mg</a>	PACT Madagascar BP 7519 Antanimena  Tél : 22 688 41, 22 641 14, 033 12 917 76
RAKOTOMANANA Fanja Michel	Chief Technical Advisor  <a href="mailto:ctadra@wanadoo.mg">ctadra@wanadoo.mg</a>	Programme « TANTSAHA » ADRA-Projet Sécurité Alimentaire Moramanga tél : 56 820 89 / 033 23 807 63
RAVONONARIMANGA Hasina	<a href="mailto:Assistante.en.plannification.regionale@yahoo.fr">Assistante en plannification régionale hasina_rav@yahoo.fr</a>	PACT Antananarivo  Tél : 033 11 643 60 / 032 07 748 35

**COORDONNEES DES PARTICIPANTS A L'ATELIER ENQUETE APPRECIATIVE Mars 8-10, 2005**

NOM ET PRENOMS	FONCTION ET ADRESSE E-MAIL	RAISON SOCIALE ET TELEPHONE
LUCHE-THAYER, Jenna	Consultant, <a href="mailto:jennaluche@msn.com">jennaluche@msn.com</a>	3400 110th Place, VEZO Beach, FL 32963 USA
RATSIOMPATRARIVO Jean Solo	<a href="mailto:jsr@dai.com">Coordonateur National du Programme ERI jsr@dai.com</a>	Projet ERI/DAI, Immeuble SANTA Lo V 2è Etage Antanimena, Antananarivo  Tél : 22 637 64 / 033 14 771 01
ERDMANN Tom	<a href="mailto:tom_erdmann@dai.com">Coordonateur Régional Programme ERI tom_erdmann@dai.com</a>	ERI Program, Villa Fanantenana V. BP 587 Bd Labourdonnais Toamasina 501. tél : 53 348 86  033 14 994 41
RAMANASE Zoely	<a href="mailto:zramanase@usaid.gov">Gestionnaire de Programme ERI – USAID zramanase@usaid.gov</a>	USAID, 6è Etage au ZITAL Ankorondrano Antananarivo  Tél : 22 539 20
ANDRIANARY Etienne Daniel	Responsable de l'appui aux institutions rurales  <a href="mailto:EDA@dai.com">EDA@dai.com</a>	ERI Program, Villa Fanantenana V.  Bd Labourdonnais Toamasina 501. tél : 53 348 86
ANDRIANARIJAONA Jean Joseph	Agent de terrain	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
ANDRIANARIVELO Aivo H.	Directeur Régional <a href="mailto:ahandrian@crs mg">ahandrian@crs mg</a>	Catholic Relief Services Toamasina . tél : 53 343 99

RAZANAJATOVO Salohy	Responsable Suivi-Evaluation et communication <a href="mailto:Salohy_Razanajatovo@dai.com">Salohy_Razanajatovo@dai.com</a>	ERI Program Fianarantsoa . tél : 75 510 21 032 40 353 64
RAMAROLAHY Heriniaina Félix	Agent de terrain	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RASON Solofohery Davida	<a href="mailto:Responsable_en_Intensification_Agricole_dar@dai.com">Responsable en Intensification Agricole dar@dai.com</a>	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RAKOTONDRAZAKA Harimanana Mamy	Responsable Gestion Communautaire des Ressources Naturelles <a href="mailto:MAR@dai.com">MAR@dai.com</a>	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RAZAFINDRABOTO Etienne Marie Sylvain	Responsable Socio-Organisation	Projet FCER/Port Immeuble tranon'ny Trondro-Anjoma Fianarantsoa . tél : 75 507 02/0331290562
RAZOHERISON Charlier Daniel	Consultant - Planificateur	FIANTSO/ARC Antenne Fianarantsoa Tél : 75 519 82
RAMESON Andrianavalontseho Hariniaina	<a href="mailto:hrameson@conservation.org">Capacity Building Manager hrameson@conservation.org</a>	Conservation International Moramanga Tél : 56 822 84
RANDRIANARISON Haja Guy	Responsable de l'appui aux institutions rurales <a href="mailto:HGR@dai.com">HGR@dai.com</a>	ERI Program Fianarantsoa Tél : 75 510 21
RAHARILAZA Viviane Nathalie	<a href="mailto:Gestionnaire_des_ressources_regionales_nat_rahara@netclub.mg">Gestionnaire des ressources régionales nat rahar@netclub.mg</a>	Ny Tanintsika (Voahary Salama) Fianarantsoa Tél : 75 512 43
RAMAHEFAHARISON Andrianjatovo H. Denis	Responsable IEC et développement régionales <a href="mailto:Voahary_Salama@netclub.mg">Voahary Salama@netclub.mg</a>	Lot VC 99 Ambohidahy Antananarivo Tél : 22 678 00

RAKOTOMALALA Limon Christian	Assistant de mobilisation sociale	Care Internationale/Mahanoro Tél : 53 901 98
RAZAFINARIVO Bakovola Anna	<a href="mailto:neny@netclub.mg">Formateur des animateurs villageois a neny@netclub.mg</a>	Voahary Salama SAF/FJKM Moramanga  Tél : 56 822 50 / 033 14 158 85
RANARIVELO Andrianivoson Navalona	Agent ERI à Andranobolaha	ERI Program, Villa Fanantenana V. Bd Labourdonnais Toamasina 501. tél : 53 348 86
RALAIVAO Jean Michel Philibert	Responsable de la Commission appui aux communes et inter-communal	CMP Besorohitra Fianarantsoa
RAZAFINDRALAMBO Edwin Alfredo	<a href="mailto:edwinalfredo@yahoo.fr">Assistant demobilisation sociale edwinalfredo@yahoo.fr</a>	Projet LÔVA, CARE, 26 Rue de la Convention Toamasina. Tél : 53 326 37, 53 341 97
RAKOTONDRABE Gabriel	<a href="mailto:dragy@wanadoo.mg">Directeur de Projet Mahatoky ADRA dragy@wanadoo.mg</a>	Projet ADRA Mahatoky Toamasina Tél : 53 343 37 / 032 07 226 78
ANDRIAMANARIVO Niaina	<a href="mailto:landriam@crs.mg">Conseiller Technique en Agriculture landriam@crs.mg</a>	Catholic Relief Service Antananarivo Madagascar  Tél : 22 206 66
RAHARINOMENJANAHARY Vololoniaina	Responsable de la Gestion Communautaire des Ressources Naturelles  <a href="mailto:vll@dai.com">vll@dai.com</a>	ERI program Fianarantsoa  Tél : 75 510 21 / 032 02 522 37
DELAHAYE Paulette Alice	Responsable de la documentation  <a href="mailto:alice@pact.mg">alice@pact.mg</a>	PACT Madagascar BP 7519 Antanimena Tél : 22 688 41, 22 641 14, 033 12 917 76
RAKOTOMANANA Fanja Michel	Chief Technical Advisor	Programme « TANTSAHA » ADRA-Projet Sécurité Alimentaire Moramanga tél : 56 820 89 /

	<a href="mailto:ctadra@wanadoo.mg">ctadra@wanadoo.mg</a>	033 23 807 63
RAVONONARIMANGA Hasina	<a href="mailto:hasina_rav@yahoo.fr">Assistante en planification régionale hasina_rav@yahoo.fr</a>	PACT Antananarivo Tél : 033 11 643 60 / 032 07 748 35

### REUNIONS POUR LA PREPARATION AUX ATELIERS ET MISSION

PERSONNE CONTACT	RAISON SOCIALE	TEL	LIEU
M. Rajaonarison Andriamiarinarivo	CARE, 1er Etage du TANA WATER FRONT, Ambodivona	2233910	CARE
M. Jean Michel Dufils, director	PACT, Immeuble SANTA, Antanimena	2262841	PACT
M. Félicien Andriamanantenasoa	CRS, Batiment CRS, route de l'Université, Ampasanimalo	320715701	DAI
M. Zoely RAMANASE	USAID, 6è Etage au ZITAL Ankorondrano	2253920	USAID
M. Clément Randriatelomanana	Voahary Salama, Lot VC 99, Ambohidahy (au dos du Centre d'Accueil)	2267800	V.Sal.
M. Michel Rakotomanana	ADRA, Lot E 217 Betambako, Moramanga	5682323	DAI

Pour INSCAE, M. Rasamoelina Zaka (Responsable sur l'Appreciative Inquiry) est en mission en Majunga et il ne sera de retour que la semaine prochaine

## ANNEX TWO

### References: for Workshops and General Research

1. The Madagascar Appreciative Inquiry (AI) Workshop used handouts, formats and sessions excerpted from French version of the Introduction to Appreciative Inquiry Training Manual Document 65, May 2003, prepared for the Community Partnerships for Sustainable Resource Management in Malawi Project (COMPASS).

The original AI Manual was prepared by: C.A.P.S. Msukwa (consultant with Development Management Associates, Lilongwe), Dian Seslar Svendsen (consultant with Development Alternatives, Inc.) & Nobel Moyo (COMPASS). The text excerpted for this assignment underwent modifications for the Madagascar AI workshop.

2. The short-form “PRA Tools Workbook” of handouts distributed in the Madagascar Workshop were excerpted from the Evaluation Rural Rapide (RRA) et Diagnostic Rural Participatif (PRA) : Un Manuel destine aux partenaires et aux travailleurs exterieurs de Catholic Relief Services CRS, by Karen Schoonmaker Freudenberger.

3. The one day orientation to COAIT “ An Introduction to COAIT Workbook” used text excerpted from the Draft Community Options Analysis and Investment Toolkit (COAIT) Manual, produced by Innovative Resources Management Washington DC 2005.

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