

Position Title:	Systemization Consultant – PREMIUM Project
Position Location:	Philippines and Canada
Status:	One month (total of 25 working days)
Travel Requirement:	Travel will be required for this assignment
Languages Required:	English

The Co-operative Development Foundation of Canada (CDF Canada) is seeking a qualified consultant (individual or firm) to identify and systematize experience and learnings from the PREMIUM project in the Philippines.

Background and Context

PREMIUM is an ongoing (October 2015-March 2019) project funded by Global Affairs Canada (GAC) and CDF Canada. It is operating in Leyte, and the Eastern and Western Samar provinces in the Philippines. As part of GAC's Typhoon Haiyan Reconstruction Assistance (The Typhoon- also called Yolanda- struck the Philippines on November 8, 2013, impacting the livelihood of over 5 million people), the PREMIUM project aims to improve the economic well-being of targeted women and men affected by the typhoon. It is specifically targeting small retailers of food and consumer goods (Sari-sari stores), in communities and villages affected by Haiyan and will support linking these enterprises to local value chains.

PREMIUM aims to improve the economic well-being for the sari-sari store owners in two distinct but complementary ways: i) 1600 sari-sari stores (SSS) will be re-established and improved to become more professionally managed, growth oriented and financially resilient, through specialized training for their owners (90% women), and ii) design, marketing and roll out of inclusive disaster related micro-insurance products to build financial resilience of the target group, including the offering of calamity-oriented store loan fund.

Co-operative Development Foundation of Canada (CDF)

CDF Canada is a not-for-profit which establishes and grows co-operatives, credit unions, and community-based organizations to reduce poverty, build sustainable livelihoods, and improve civil society in less developed countries, with climate resilience and gender as key cross-cutting priorities. CDF Canada has at its core the universal co-operative principles of voluntary and open membership, democratic member control, member economic participation, autonomy and independence, education, training and information, co-operation among co-operatives and a concern for community. CDF Canada proudly delivers programs to help poor communities fight poverty and create more secure lives through community-owned co-operatives. For more information about CDF Canada, please visit our [website](#).

Implementing Partners

The project is being implemented by the Cooperative Development Foundation of Canada (CDF) in partnership with the following:

- **Microventures Foundation (MVF)** responsible for training of sari-sari store owners
- **Center for Agriculture and Rural Development Inc. (CARD)** responsible for the Storeowner Loan Fund

- **RIMANSI Organization for Asia and the Pacific, Inc. (RIMANSI)** responsible for developing disaster risk mitigation micro-insurance

Objective(s) for the Systematization of Experiences/Learnings

The main objectives for the systematization are to:

- critically reflect on the journey undertaken by the sari-sari store owners in having their resilience and capacity built to cope with natural disasters (*includes skills training and access to financial products and services*).
- Specific objective: Systematization of experiences generated, with a special focus on those which are replicable for implementation of similar projects and providing recommendations for scale up/piloting of new project.
- identify and analyze the lessons learnt from the project in order to promote the exchange and dissemination of the knowledge and experiences gained.
- Specific objective: Learnings organized and classified into lessons learnt, and a methodology devised for effective communication of the learnings among a wide audience. It is expected that the knowledge gathered will be utilized to:
 - maximize project impact through wide dissemination of findings/lessons learnt
 - identify and analyze lessons learnt with an aim of improved implementation for a potential scale up and systematize experiences that are replicable for implementation of other projects in similar context.

Methodology

Once selected, the consultant is expected to undertake the **key tasks** below:

- **Systematization plan design**: In conjunction with the given guidelines in this ToR, discuss with relevant stakeholders to finalize the objective(s) of the systematization. Develop clear methodology and tools to carry out the systematization process. The following steps must be included:
 - **Justification and purpose**: What part (or parts) of the project (“what experience” or “what outcome” or “what component”) is being systematized and why? Why it is important and to whom?
 - **Key question**: Identify the main question(s) that will guide the systematization process. The question(s) should guide us in finding how and why something happened, and how to avoid the problems and bottlenecks that came about during the process.

For example:

<i>What experience</i>	<i>Purpose</i>	<i>Main question</i>
<i>Improved resilience to natural disasters for sari-sari store owners</i>	<i>To be able to replicate the process with sari-sari store owners in other areas</i>	<i>Which actions of the project were instrumental/useful and helped to bring about the change and which were not useful?</i>

The key question will generate many sub-questions which should be further analyzed e.g.

- *Which components of the capacity building program were the most useful in building technical/operational capacity and why?*
 - *What were the roles of the implementing partners in building SSS owner capacity?*
 - *Were there any significant changes in the Philippines Insurance Commission in terms of improved regulation?*
 - *How did some of the SSS become sustainable, profitable ventures (while others did not)?*
 - *What was the role of the project in setting up a resilient supply chain?*
- **Plan:** How will the systematization be carried out? Methods, type of activities and persons responsible for carrying them out, information sources, timeline & schedule.
- **Reconstruction of the experience(s):** Collect data based on the key question developed in the planning phase. This includes desk study of project documents, but the consultant will be mainly focusing on facilitating meetings with relevant stakeholders (including but not limited to implementing partners, relevant government line agencies/depts, members of the community and of course the SSS owners), developing and deploying tools and methods for discussion and collection of participants' feedback. The idea is to report the real process, not what was hoped or planned to happen. Include both objective facts (place, dates, events) and subjective ones of project participants (opinions, feelings etc.). Special attention needs to be paid to how things have happened.
 - **Analyses and interpretation:** This will be condensed into lessons learnt without generalizing. Must facilitate the process of key actors, especially project participants, being involved in the process of collective learning and generation of new knowledge. Facilitate group discussions, role play and other forms of data collection to collect data in reconstruction of the experience(s). Participants can be divided into thematic groups/core groups etc.
 - **Communication of the systematization result:** The purpose now is to communicate and disseminate the experience and its lessons. The challenge is that other people, who did not live this experience, should be helped to understand it and take advantages of the lessons learnt. An audience analysis should be conducted as well.

Systematization intends to answer the following general questions, and it is suggested that the consultant ensures that these are answered relevantly/appropriately to meet the objectives of the assignment:

- What was the nature of the project? What was the experience (that is being systematized) about? Who were the stakeholders/actors? How do they relate to one another?
- What was done, why, how and for what purpose and by whom?
- How did the cultural, economic, geographic, institutional and political factors influence the process?
- Which expected and unexpected processes and results occurred during the experience?
- What were the results and impacts of the intervention/project and why did they happen? (The 'why' and 'how' should be a core focus)
- What were the problems the project had to face and how were they addressed?
- Which were the factors that facilitated or hindered the achievement of objectives?
- What lessons did the different stakeholders involved in the experience come out with?

- Which lessons can be communicated or considered for the future?

Proposed Timeline

It is estimated that the evaluation should take no more than **25 working days**.

Key Deliverables

1. **Tools and methods developed** to carry out the systematization process (to be finalized after discussion with CDF Canada HQ project team).
2. **Systematization report.** This must include but not be limited to:
 - **Systematization of experiences** that are replicable for the implementation of similar projects /scale up.
 - **Identification of good practices, and learnings organized and classified into lessons learned.** This includes disaggregating key elements of learning for:target group/project participants, implementing partners (Rimansi, CARD, MVF), funders and the wider community and the public sector.
 - The learnings must further depict (e.g. through case studies) the process/journey of participants who have successfully completed the training modules and are operating their business profitably versus those who have dropped out.
 - **Demonstration of some of the key achievements of the project** including some of the more qualitative changes that may not have been necessarily captured through the project's Performance Measurement Framework (e.g. gender related behavior change, nuanced changes in perception and attitude of the SSS owners, changes in business practices for paving the way towards a resilient community, project management structure and operational effectiveness etc.
 - **A comparison matrix of similar interventions in the Philippines** (Can be based on desk research).
3. **A dissemination mechanism for** sharing lessons learnt and good practices with a wide audience including recommendations for what delivery method (e.g. cartoons, pamphlets, reports, testimonial videos, etc.) would work best for each category of audience.

Consultant Expertise and Qualifications

Note: the consultant must be available in the following timeframe: **January – February 2019**.

Required

- Demonstrated experience in systematization of experience, preferably in the development sector.
- Proven professional experience conducting evaluations of development projects, with experience using a variety of participatory methodologies in the field.
- Highly skilled in social research techniques, especially participatory approaches.
- Demonstrated experience applying a gender-sensitive approach to research.
- Demonstrated cross-cultural sensitivity and ability to work in cross-cultural environments.
- Excellent analytical skills.
- Holds a valid passport (for international consultants) and ability to travel to the Philippines, including remote areas where amenities may be limited.

Desirable

- Educational background in social sciences, international development, gender and development is an asset.
- Experience and knowledge of microinsurance / microfinance / microenterprises.

Compensation

Compensation will be commensurate with experience. Travel and related expenses must be pre-approved and will be reimbursed in accordance with CDF Canada guidelines specified in the contract.

Submissions

Please submit the following documents to apply@cdfcanada.coop no later than **January 4th, 2019**. Include the position title (“PREMIUM Systematization Consultant”) in the subject line.

- Current resumé with a cover letter.
- A technical proposal with methodology (based on this Terms of Reference), consultant profile and capacity, statement of experience, and initial work plan and delivery timeframes (no more than 5 pages).
- Financial proposal (daily rate, travel cost, other expenses).

CDF Canada thanks all applicants for their interest, however only shortlisted applicants will be contacted. CDF Canada is an inclusive employer. If selected for an interview, please advise if you require accommodation during the interview process and we will work with you to meet your accessibility needs.