

GUIDELINES FOR THE
Implementation
of in-country and project-scale
Learning Routes



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Introduction

Within the framework of the joint IFAD-funded Large Grant programme: “**Strengthening Capacities and Tools to Scale Up and Disseminate Innovations**”, the Procasur Corporation supports knowledge management and capacity-building strategies aimed at scaling up best practices and innovations that contribute to reducing poverty among IFAD stakeholders in East and Southern Africa (ESA), West and Central Africa (WCA), Latin America and the Caribbean (LAC) and Asia and Pacific (APR) regions.

The programme’s objective is to enhance implementation performance and impact of rural development projects in LAC, ESA, PTA and WCA by increasing access to knowledge, capacity building and scaling up of good practices.

This objective is achieved by:

- Identifying, organizing and disseminating existing knowledge on innovations and best practices;
- Identifying local “champions”, or people who play a key role in promoting innovations, and enabling them to organize and share their experience using the Learning Routes methodology; and
- Designing and implementing Learning Routes and disseminating the knowledge acquired.

The IFAD Country Office in Sudan has participated in several Learning Routes, and on the basis of this experience, has proposed customizing the methodology and making it simpler and easier to use. This would allow projects and the country office to share knowledge and ideas more easily, and therefore contribute to improved performance.

These guidelines are based on draft guidelines proposed by the Country Office, which in turn are largely based on original material produced by Procasur. They reflect the experience gained by Procasur in its work with rural communities and organizations in the Global South, and are also an expression of the value that IFAD’s country programme in Sudan places on the Learning Routes methodology as a tool for rural transformation. These updated guidelines have incorporated comments and lessons from the training and field exercise undertaken with IFAD project staff in Uganda in July 2014.¹

The guidelines are rooted in fieldwork and real-life experiences. They are therefore a work in progress that will grow with the contributions of the communities, organizations and projects using them. Users are encouraged to be flexible and innovative, and when they discover new ways of sharing knowledge, to contribute this information to the guidelines. Users’ suggestions and ideas are essential for making the guidelines better.

The present guidelines give an overview of the Learning Route methodology in its three main stages:

- (i) KNOWLEDGE, with the design and preparation of the Learning Route
- (ii) KNOW-HOW, with learning visits
- (iii) INNOVATION, with follow-up to the participants to support their innovation plans

For each stage, the guidelines outline the main concepts and tools to be followed in order to succeed with the design, implementation and follow-up of the Learning Route concerned.

Feedback and suggestions should be addressed to: africa@procasur.org.

¹ *Methodological Transfer: “Knowledge Management Tools for Enhanced Project Performance: Effective peer- to-peer learning through the Learning Routes in Uganda”, Uganda, 28 July - 1 August 2014.*



The Learning Route as a knowledge management tool

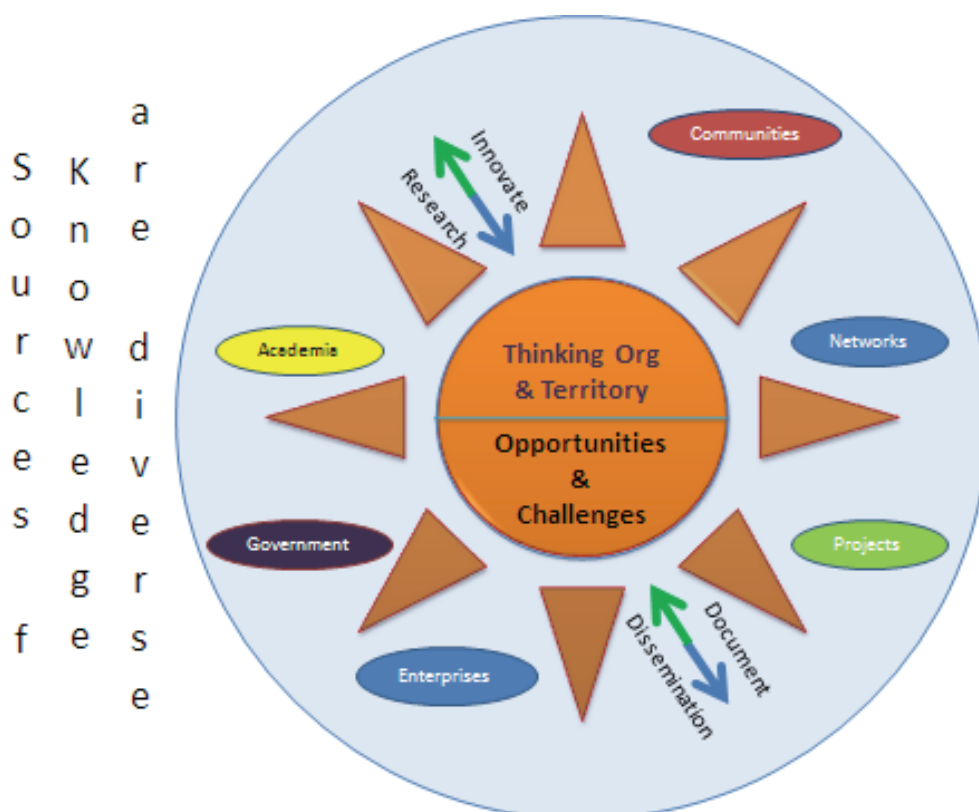
The Learning Route is a planned journey with the following learning objectives:

- i. To address the knowledge needs of development practitioners; and
- ii. To map the experiences of local actors who have tackled similar problems in innovative ways, with successful results, and have accumulated knowledge that is potentially useful to others.

The Learning Route allows for an experiential encounter between “learning travellers” and “knowledge hosts”, both having mutually useful experiences and knowledge to exchange. In this encounter, participants learn distinctive lessons that bring them face-to-face with their previous knowledge and experience.

The main goal of a Learning Route is that participants are able to identify potentially useful innovations, understand and learn from them, and then successfully adapt and apply them to their own organizations and contexts.

Sources of knowledge are diverse



Successful solutions to rural issues in one context can be adapted and duplicated in other contexts. A process is needed to identify the innovations that function well within the livelihood strategies of poor rural communities.

The Learning Route cycle

A **Learning Route is a cumulative process** that begins with the identification of the relevant KNOWLEDGE to be documented and disseminated, followed by the acquisition of KNOW-HOW by learning from innovative experiences, and concluding with the INNOVATION being adapted by Learning Route participants in their own organizations and contexts.

I. KNOWLEDGE – PREPARATORY STAGE



Building on acquired knowledge

Each Learning Route is the product of intersecting knowledge needs and relevant experiences in the country.

In the preparatory phase, the organizers of the Route will:

- i) Identify the target groups that need the Route's knowledge and define the learning objectives of the Route.
- ii) Identify, document and systematically organize the existing knowledge according to the Route's learning objectives.

1. Objectives

Learning objectives identify what learners will be able to do if the Learning Route is successfully developed. More specifically, they outline the new understanding, skills and behaviours that participants are expected to acquire through the Route. Participants' learning needs contribute to the definition of the learning objectives.

Fundamental principles of learning objectives

- ✓ The learning objectives refer to the person who is learning, and not to the goals or activities of the organizers of the training course.
- ✓ The objectives are concrete, attainable and measureable.
- ✓ They are expressed in active verbs and can be organized in the following six categories: knowledge, comprehension, application, analysis, synthesis and evaluation.

An example of learning objectives from one Learning Route

The Learning Route (LR) on *“Innovative tools and approaches to enhance gender equality in value chain development, a case of Uganda”*, implemented in Uganda from the 23rd November to 1st December 2015, was designed with the following learning objectives:

- **Main objective:** To promote understanding about how gender equality and the empowerment of individuals and their households can be addressed through specific approaches, services and products developed within the framework of rural microfinance delivery models; and to extract lessons applicable to other contexts.
- **Specific objectives:**
The specific learning objectives of the LR were to:
 1. Acquire practical tools for supporting the empowerment of vulnerable men and women involved in the development of value chains through community planning and peer learning;
 2. Analyse the best practices and innovations in the Gender Action Learning System methodology (GALS) across the VCD.
 3. Plan the use of these tools and best practices to improve performance and outreach.

2. Systematization

Once the main training needs and learning objectives are identified, a series of consultation activities need to be carried out. Through this process, a number of best practices are identified, and, on the basis of these, a few “local champions” implementing these best practices are chosen to host the Route (“knowledge hosts”). Criteria for the selection of hosts include:

- i. **Value of acquired knowledge:** examples of innovations that help resolve common problems relevant to the defined learning objectives;
- ii. **Interest in sharing knowledge:** organizations interested in being hosts and presenting their experiences to visiting groups; and
- iii. **Organizational strength:** a proven record of problem-solving and demonstrated sustainability of the organization and its initiatives.

Following the identification of knowledge hosts, a participative process is initiated to capitalize on the information available. The objective is that protagonists in the host organization reflect on their path to success, identifying critical milestones, stakeholders, obstacles, achievements, enabling factors, challenges and lessons learned.

The participation of stakeholders, local champions and partners is critical at this point of the systematization process because it makes it possible for knowledge to be collected and organized into lessons learned. At the same time, the group process strengthens and empowers all participants by allowing them to acquire new knowledge-sharing skills.

It usually takes at least 2-3 days to systematize the knowledge of one host, depending on the complexity of the experience. The systematization process is seen as an opportunity for local actors to reflect on their experiences collectively. It can lead to participants’ increased self-esteem and a greater recognition of the value of their leaders and team members.

What is a relevant experience?

- ✓ An experience is relevant when it shows evidence of the use of good practices and/or innovations that have proved successful in addressing local challenges and improving local people's livelihoods.
- ✓ Improvement of local people's livelihoods can have:
 - A tangible dimension (incomes, physical assets, natural resources, infrastructure)
 - An intangible dimension (gender equality, social inclusion, political participation)
- ✓ From a successful experience, it is possible to identify good practices and extract lessons that can be applied to other contexts with similar situations or needs.



Tips

- To encourage participation, make sure that the hosts understand the nature of the activity and the benefits of being part of this learning initiative.
- Include different actors, with distinct perspectives and voices, in the systematization process. For example, besides the leader of the organization, include non-formal leaders, women and youth. Also, go beyond the organization and enrich the learning by including external partners, such as the government, NGOs and the private sector.
- Facilitate reflection about the process by asking questions such as: How was it before? How is it done now? What were the main events leading to the change? Who are the main actors in the process?
- Analyse the factors that facilitated the development of the experience.
- Stimulate the identification of lessons learned by asking questions such as: How were you able to achieve these improvements, changes? What strategies did you use? What would you do differently next time?
- Produce support material to help in the systematization, such as maps, flip charts and note cards. Written support should be brief, and be oriented towards questions that stimulate reflection. Visual aids will have better results with people who have limited writing and reading skills.

3. Skills reinforcement

After systematization of the experience, the next step is to reinforce local champions' skills for knowledge-sharing and hosting a learning initiative such as the Learning Route. In this process, which usually takes one day, future hosts will acquire knowledge-sharing tools and techniques, learning, among others, how to make a presentation, use maps, prepare role plays, conduct learning tours and facilitate discussions.

Local champions are people with practical knowledge, who stand out in their organization or community because their actions and new ideas have brought about positive changes. Their expertise makes them protagonists in the Learning Routes and potential providers of training in rural environments.

Case Study 1 - Example of local champions in Uganda: Mr and Mrs Ndimugezi Igulo

Ndimugezi Igulo and his wife (pictured here) live in Iganga, Uganda, with their seven children. He has been a member of the Iganga District Farmers Association since its inception in 1992, and when the association started a village savings and loan association (VSLA) in 2005, he was elected as its first chairperson. The couple have both served in different capacities on the VSLA executive board over the years. Although now both retired, they remain active members, and their home currently serves as a meeting place for three different VSLAs.



Both husband and wife, together with one daughter, are also members of a VSLA in their individual capacities. The couple jointly plan and agree

on how to invest the loans obtained from the VSLA. Thanks to these loans, they have diversified their economic activities in order to meet their household's short-, medium- and long-term income needs: they raise layer hens and turkeys; practise zero-grazing dairy farming; and grow food crops (including beans, groundnuts and sweet potatoes), cash crops (such as maize and coffee) and fruit (mainly avocado, passion fruit and mangoes). The Igulos reported a daily turnover of 70,000 Uganda shillings from the sale of eggs alone (with an average of seven trays of eggs a day). The interchanging roles played by all household members, regardless of gender, as they milk the cows, feed the chickens, work in the fields or tend the garden are a clear testimony of how a rural household can transcend traditional gender roles, embrace equality and maximize output.

The VSLA has over the years provided the couple with a training ground for nurturing a savings culture and a loan repayment discipline. The linkage established between the VSLA and Barclays Bank has been extended to benefit individual VSLA members such as the Igulos, who now hold individual bank accounts in Crane Bank and Barclays Bank respectively. There is no doubt that the VSLA has provided a pathway for the Igulos from financial oblivion to financial inclusion.

4. Documents

During the preparatory phase of the Learning Route, relevant documents are produced:

- ✓ Case studies on the knowledge hosts;
- ✓ Technical files to describe in detail the visits to be made during the Route (only for internal use);
- ✓ A bibliography on the main topics of the Learning Route;
- ✓ The Route programme; and
- ✓ Operational information.

These materials should be available before the Learning Route to help participants prepare for the experiential learning during the implementation stage.



What is a good practice? What does innovation mean?

- ✓ *A good practice* is a habit or action that has been shown to work well in the context in which it was developed and is therefore proposed as a model to be used in other similar contexts
- ✓ In rural development, a good practice is a solution that has been tried and validated by local people, and that has proved successful, at an economic and/or social level, in reducing rural poverty and improving livelihoods. These practices have the potential to be adapted or replicated in other contexts and therefore should be shared so that more people can benefit from them.
- ✓ In this sense, a good practice is:
 - Effective, showing positive impacts on people's livelihoods;
 - Sustainable, meaning that, in the long term, it will not negatively affect the economic, social and environmental situation;
 - Socially owned by the people who have developed it;
 - Adaptable and replicable in similar situations; and therefore
 - Worth sharing.
- ✓ *Innovation* means "something new" that has not been experienced before. An innovation is not new per se, but it innovates according to the context in which it has been created. An innovation can refer to practical actions (e.g. new agricultural models, new ways to manage funds) or to a change in social habits or attitudes (e.g. change in the role of women at village level).

II. KNOW HOW - IMPLEMENTATION STAGE



Implementing a Learning Route

This stage involves preparing and implementing a Learning Route for 15 to 25 participants with visits to relevant knowledge hosts. The objective is for participants to learn in person how these organizations and their partners have satisfied needs or resolved problems similar to those they themselves face, and to acquire the know-how developed from that experience to support their own innovations.

1. Field visits

During the visits, the knowledge hosts present their experiences and lessons learned. Each visit is a guided learning experience, with experiential learning contents and dynamics structured according to the learning objectives. An environment conducive to dialogue and exchange is created, and participants are encouraged to seek out the information that is of most value to them. In this environment, hosts and participants come together and are enriched by each other's experiences, forming a collaborative, mutually beneficial partnership.

2. Learning facilitation

The Learning Route combines field activities with analysis, to facilitate individual and collective reflection on the significance of the case study being examined. Facilitation and technical support are key aspects throughout the Learning Route since they ensure in-depth analysis. The organizing team has to make sure that participants' learning is directed towards the Learning Route's objectives. Therefore, it is important that, before each visit, they provide participants with basic information about the knowledge hosts and why they were selected, and then, after the visit, hold analysis workshops to tease out the lessons learned.

3. Innovation plan

From the beginning of the Learning Route and throughout the whole journey, participants—individually or per organization—work on an innovation plan. The objective is to use the acquired lessons to identify and adapt potentially useful innovations to their own context. Plans should be time-bound, actionable, achievable and, above all, realistic.

The design of an innovation plan is supported by three activities:

i) **Experience fair.** An experience fair is the first activity in the design of an innovation plan. It takes place during the first day of the Learning Route and allows participants to update each other on areas of interest and lessons learned.

ii) **Design workshops for innovation plans.** Workshops are held throughout the Learning Route. Their purpose is to facilitate the adaptation of innovations to the individual context of each organization. The organizing team provides a basic introduction (conceptual and methodological), and encourages a discussion about existing doubts, contributions or collaboration among the proposed initiatives. The output is the design of an innovation plan.

iii) **Innovation plans fair.** On the last day of the Learning Route, each organization presents a summary of its innovation plan. A panel of experts provides feedback and the other participants add their own perspectives to those of the experts.

4. Evaluation

On the last day of the Learning Route, participants and the organizing team carry out a group and an individual evaluation of the experience. This serves to improve the next Learning Route, but it also provides an important opportunity to show appreciation for the learning process that participants have undertaken by awarding them a certificate of participation.

Tips

- Make sure that participants provide you with feedback on the extent to which the learning objectives have been achieved, the performance of the organizing team and the learning value of the case studies.
- Try out different ways to carry out the evaluation, such as games or a survey.
- Do not forget participants' feedback on the steps they intend to take in implementing the innovation plans. It is what comes next!

III. CAN DO – FOLLOW-UP STAGE



Following the paths of innovation

The Learning Route does not end with the journey since the main goal is for participants to implement their innovation plans at project level and with their organizations and institutions. This stage is crucial and tests how well participants have acquired the learning sought, and how they can best apply that learning to their particular context.

1. Learning dissemination

Once home, participants will want to share the lessons they have learned with their organization. It is therefore important to support them in preparing and implementing a sharing event to enhance capacities and attract new partners in the innovation process that they are championing.

2. Innovation plan

To be successful, an innovation plan has to engage and represent the different people and organizations involved in both the problem and the solution. Each participant will have to map these stakeholders and define a path for sharing, improving and validating the innovation plan originated during the Learning Route.

Once the innovation plan has been revised, improved and validated, the participants can share the final version with the organizing team for final feedback.

Tip

- A small incentive in money or another kind of award can help motivate participants to devote the time needed to develop a high-quality innovation plan.

3. Evaluation

It is a good idea for the organizing team to evaluate jointly with Learning Route participants, 3-6 months after they return home, the progress they have made in implementing the innovation plans. The team should organize field visits to the sites where the innovation plans are being implemented in order to understand what participants have achieved and the challenges they are facing, and to determine how best to support their plans in the future. This activity will give a new boost to the innovation plans.

4. Closure

A long time elapses between designing the Learning Route and closing the cycle. During this time, many knowledge products are created, knowledge champions are formed, and information is disseminated about the Learning Route through publications, websites, videos and photos.

Tip

- Don't miss the opportunities that workshops, meetings and other events provide you to talk about the results of your Learning Route and therefore increase its reach.



Lessons from the transfer of Learning Routes methodology in Uganda

IFAD has adopted Learning Routes as one of the strategies to be used to enhance knowledge management, share experiences and nurture local talent in rural communities in Africa, Asia and Latin America. Uganda has hosted a number of Learning Routes in the past few years and, as a result, the staff of IFAD-supported projects have gained an understanding of the value of this methodology in training and skills transfer exercises involving rural communities. Against this backdrop, a training course on the Learning Route methodology, entitled “Knowledge Management Tools for Enhanced Project Performance: Effective Peer-to-Peer Learning through the Learning Routes in Uganda”, was held in Uganda in July 2014

Seventeen participants from IFAD-funded projects, together with project partners and stakeholders, participated in this training course. Its objectives were to: (i) develop the knowledge management skills of strategic project staff, particularly in the use of Learning Routes guidelines; and (ii) apply Learning Routes concepts and methods to the organization of in-country and project-scale Learning Routes in Uganda. The course was organized with the support of the Vegetable Oil Development Project (VODP), and in particular with the Eastern Hub in Mbale, which proposed the visit to the Bunambutye Area Cooperative as a case study to be developed during the five-day workshop.

In the opening session, the participants, with guidance and support from the Procasur team, were actively involved in analysing the VODP and specifically the Bunambutye area cooperative, in order to identify specific thematic areas of interest, determine learning objectives and prepare guiding questions for the field test exercise.

Field excursions in Bulambuli, where the Bunambutye cooperative is based, were organized to enable participants to test the systematization tools (i.e. timeline, map of actors, focus group discussions and interviews). Through the use of these tools, participants gained in-depth understanding of key issues such as the cooperative's governance, management, products, services, clientele and operations. Working with the local champions, participants also received guidance on how best to organize a field visit agenda, and ways to support the local hosts in showcasing their skills, best practices and innovations.

The lessons learned by participants during the in-field training exercise are summarized below:

1. Knowledge – Preparatory stage:



- Defining learning objectives and key thematic areas of learning is crucial in the design phase of a Learning Route and will guide organizers in selecting the most appropriate case studies for a Learning Route;
- A preliminary (or preparatory) visit to the selected knowledge host is an important step in preparing the Learning Route. However, in some cases, the scarce availability of funds can make such a visit unfeasible. It is therefore important to budget for this expenditure when planning the Learning Route;
- During the preliminary visit, participatory methods to analyse and document the case study are invaluable. This enables the organizers and the knowledge host to identify jointly the appropriate information to be shared with participants during the Learning Route's visit and to determine the specific lessons and innovations of the experience;
- Certain tools can be used for field activities during the preliminary visit in order to involve local champions directly in the collection of information. These include talking maps, a map of actors, field visits and focus groups;
- The preliminary visit is essential for preparing, in collaboration with the local champions, an agenda for the Learning Route visit. The agenda must be agreed on by all. It should contain a clear definition of roles and responsibilities and take into consideration technical, methodological and logistical aspects of the visit;
- It is important to systematize and document the case studies well in advance in order to give participants ample time to prepare for the Learning Route;
- Supporting the hosts in their role of knowledge providers will greatly increase the likelihood of a successful field visit. Specific activities need to be included in the agenda to ensure that knowledge-sharing between hosts and guests is a two-way learning process;
- The Procasur methodology provides a well-organized format for structuring a Learning Route and enables a good transfer of knowledge. However, logistical aspects (accommodation, food and sanitation) are also very relevant for enhancing the learning.

2. Know-How – Implementation stage



- The organizing team of a Learning Route includes a general coordinator, a methodological coordinator and a logistical coordinator. This provides a clear definition of roles and is therefore an efficient way to organize the staff involved in preparing and implementing the Learning Route.
- The selection of participants is the key to a successful learning experience. Participants should be motivated and they should be in a position to disseminate innovations in their own organizations, projects or communities when they return home;
- In addition the visit to the knowledge hosts, specific pedagogical activities, such as case analysis workshops and innovation plan workshops, are necessary to consolidate learning and elaborate innovation plans;
- The innovation plan is a crucial tool for transferring innovations and ideas from one place to another. A specific template for the innovation plan needs to be shared with participants, who will be guided by the organizing team in the gradual elaboration of the plan, during and after the Learning Route.

2. Can do – Follow-up stage



- Incentives in money or in kind can motivate participants to develop and implement their innovation plans;
- Lessons from a Learning Route need to be documented and then disseminated through a website and other channels of communication in order to maintain the community of practice that has been created by the Learning Route experience;
- Obtaining an evaluation from participants is crucial for assessing the performance of the Learning Route and monitoring the implementation of the innovation plans.

Case Study - Bunambutye Area Cooperative Enterprise

The Bunambutye Area Cooperative Enterprise (ACE) has made excellent progress over the years as a result of capacity-building provided by various value chain actors. It has built its own store and office, improved seed quality, applied fertilizers to increase yields and accessed market information services. It has also improved its record-keeping and now uses standard weighing scales. To the farmers, this has meant increased income, women's empowerment and improved education.

Until 2001, farmers in the area were not organized in trade unions or cooperatives. In view of this, in 2001, the Uganda Cooperative Alliance (UCA) encouraged them to form parish farmers' associations. Four associations were formed, each with a membership of about 50 farmers. During the same period, the IFAD-funded Vegetable Oil Development Project (VODP) came to the area, working with the Uganda Oilseeds Producers Association.

In 2003, the UCA introduced the Farmers' Empowerment through Agricultural Services Programme, which showed farmers the benefits of collective marketing and encouraged them to treat farming as a business. Farmers received training in extension work and agricultural crop development. In 2008 The Uganda National Agro-Input Dealers Association trained farmers in the use of agricultural inputs and modern farming practices. Two years later, Uganda Oilseeds Producers and Processors promoted sunfora seed sunflower production. In 2012, Kilimo Trust provided training in market linkages, while the Eastern Private Sector Development Centre built capacity and provided market information services. In 2013, the second phase of VODP set up farmer learning platforms for the Pana sunflower variety.

ACE is the product of all those initiatives. It works closely with the local government, especially the Production Department and the commercial officer, to monitor that all its main enterprises – sunflower, maize, rice and beans are developed and find a market. It also cultivates and sells irrigated horticulture crops such as onions and tomatoes.

