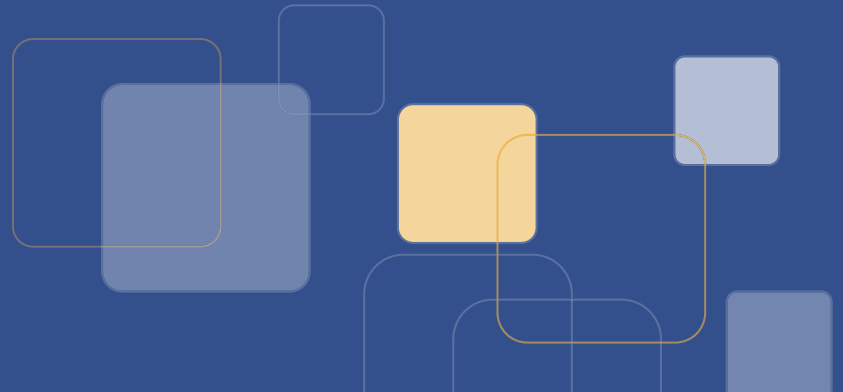




**USAID**  
FROM THE AMERICAN PEOPLE

# Transforming the Moroccan Medicinal and Aromatic Plant Sector to Compete in the New Global Economy



A SCALE CASE STUDY

MOROCCO



# Acknowledgements:

We wish to acknowledge and thank the many people who made the ground-breaking work described in this case study a reality:

**The stakeholders of the Moroccan Medicinal and Aromatic Plant Sector who are working together to transform their sector, their economy, and their lives.**

## **United States Agency for International Development (USAID)**

Roberta Hilbruner, Development Communication Specialist

Richard Rousseau, Economic Growth Officer USAID, Morocco.

Jawad Bahaji, Development Assistance Specialist, USAID Morocco

## **AED Agricultural Partnerships for Productivity and Prosperity (AP<sup>3</sup>) Project Staff**

Patrick Papania, Director

Aboubakar El Asri

Fouad Zahiri

Nezha Ettebaa

## **AED GreenCOM/AP<sup>3</sup> Washington, DC, Staff**

Karabi Acharya

Bette Booth

Shera Bender

Tito Coleman

Reena Borwankar

Sue Lomenzo

Richard Bossi

Gregory Valadie

Other materials on SCALE include the publication *Going to SCALE: System-wide Collaborative Action for Livelihoods and the Environment*, a video *Succeeding at SCALE, A New Direction for Development*, and the Kenyan SCALE demonstration case study *Transforming the Kenyan Dairy Feeds System to Improve Farmer Productivity and Livelihoods*.

This case study was prepared as part of the Cooperative Agreement USAID Agreement No. AGE-A-06-00005-00 / AED Reference No. 3569-005, part of the FIELD-Support Leader-with-Associate Award USAID Agreement No. EEM-A-00-06-00001-00 / AED Reference No. 3569. It was funded and managed by the USAID Economic Growth, Agriculture, and Trade Bureau: Natural Resources Management Office. Technical services for FIELD-Support LWA and this Cooperative Agreement were provided by the Academy for Educational Development (AED). The contents of this publication are the sole responsibility of the Academy for Educational Development and do not necessarily reflect the views of USAID or the United States Government.

*The SCALE name and process graphic are trademarked to the Academy for Educational Development.*

*This publication may be adapted, translated, or used in any form without permission provided the materials are distributed free of charge and USAID and AED are acknowledged.*

# Contents



4 **A Promising Future for Moroccan Agriculture**

---

6 **Taking the Moroccan MAP Sector to Scale with SCALE**

---

7 **What is SCALE?**

---

8 **SCALE Hits the Ground**

Map the Context  
(AUGUST–SEPTEMBER 2005)

Catalyze Coalitions and Partnerships  
(SEPTEMBER 2005)

Create Collaborative, Sustainable Solutions and Act  
(OCTOBER 2005–SEPTEMBER 2006)

Value  
(SEPTEMBER 2005 TO SEPTEMBER 2006)

---

18 **Results and Lessons Learned**

---

20 **Implementing SCALE Checklist**

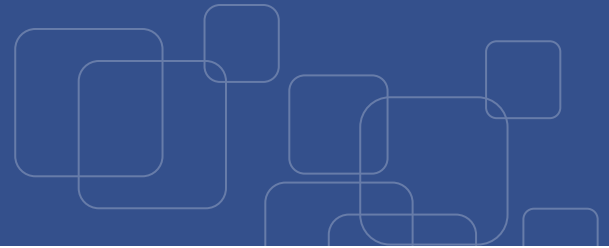






Across the world, development practitioners are faced with a common challenge: how to scale up activities to reach thousands of women instead of dozens, tens of thousands of farmers instead of hundreds, and millions of babies instead of thousands. **SCALE—System-wide Collaborative Action for Livelihoods and the Environment**, is a communications-driven management approach that results in greater impact at scale, creating social capital, strengthening governance, and increasing sustainable economic growth and livelihoods.

# A Promising Future for Moroccan Agriculture



## SUMMARY

**WHAT:** Agricultural Partnerships for Productivity and Prosperity (AP<sup>3</sup>), a demonstration project of the application of SCALE (System-wide Collaborative Action for Livelihoods and the Environment) in the medicinal and aromatic plant (MAP) sector

**WHERE:** Morocco

**DURATION:** One year (August 2005–September 2006)

**RESULTS:** A strengthened MAP sector through:

- Increased social capital, networks, and communication.
- Improved vertical and horizontal linkages throughout the sector value chain.
- Increased livelihoods for rural poor through the transfer of rosemary collection rights to local cooperatives, the ending of a private sector boycott of forest concessions, a more engaged and connected private sector, and increased access to global and national markets.

On the first day of January, 2006, as the sun rose across the slopes of the Atlas Mountains, life for the people who made their livelihoods through agriculture changed forever. The dawning of the New Year brought with it a new Free Trade Agreement between the United States and Morocco. The agreement's elimination of tariffs on U.S. agricultural products sold in Morocco would result in lower prices for the cereal crops that most farmers produced. To maintain income levels, farm families across the country would have to become more creative, diversified, and competitive. Morocco would need a virtual transformation of the country's agriculture and rural economy—shifting toward higher value-added production and the creation of new businesses and job opportunities.

The informal medicinal and aromatic plant (MAP) sector represented a promising option. Under the new agreement, MAPs emerged as one of Morocco's agricultural products with greatest potential for growth. Morocco already ranked ninth in the world in MAP exports and the organic MAP market was growing significantly every year. MAPs could viably provide a source of sustainable income for farmers, collectors, and many other Moroccans associated with the value chain, most of them rural poor.

Morocco was poised to build on, strengthen, and expand the MAP sector. However, competing more rigorously in the new global economy would require an entirely new way of working. Before globalization, “[F]irms tended to compete against other firms in the same country. Since globalization, industries in one country are competing against the same industry in another country . . . . The entire market system that delivers a product from its inception to the consumer must be able to compete



against market systems elsewhere.”<sup>1</sup> In order to compete globally, the Moroccan MAP sector would need to grow and mature from a disorganized and disconnected set of isolated activities to a viable and vibrant MAP value chain that could respond to the challenges and new opportunities of free trade through increased efficiency and synergy of working relationships.

---

<sup>1</sup> Kula Olaf, et al., *Globalization and the Small Firm: An Industry Value Chain Approach to Economic Growth and Poverty Reduction* (Washington, DC: USAID, 2006), p. 4.

As you look throughout the world, Morocco produces a lot of plants that are really valuable to that sector [MAP] . . . .The question really is whether or not the people who are looking for those plants can find them, and find them with the certifications and the qualifications that they are looking for.

—Oren Wool, *Simplers Botanicals*

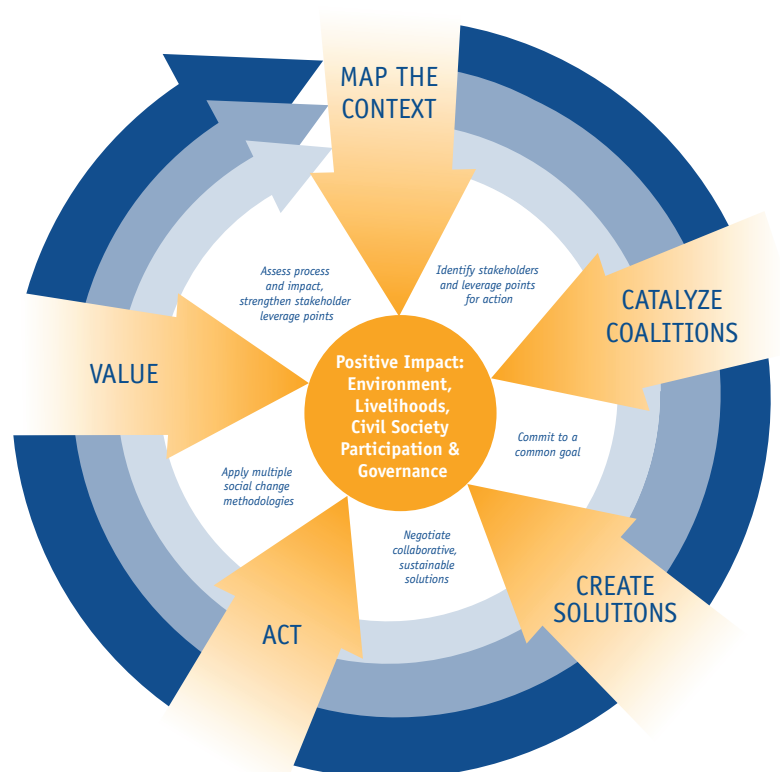
# Taking the Moroccan MAP Sector to Scale with SCALE

The Economic Development Office of the USAID Mission in Morocco invited the Agricultural Partnerships for Productivity and Prosperity (AP3) project to work in Morocco because it believed the nascent MAP sector would be fertile ground for a demonstration of SCALE. SCALE had only recently been developed as a transformational methodology based on lessons learned from the thirteen-year, thirty-country experience of the USAID Environmental Education and Communication Project (GreenCOM) and tested agricultural extension efforts over the previous forty years. The SCALE systems-wide social change framework, participatory management process, and set of tools interweave governance, economic, environmental, and social interests in a way that manages and conserves resources while creating new economic opportunities (see box on page 7).

USAID/Morocco believed that the systems approach of SCALE could catalyze and strengthen the relationships within the MAP value chain in ways that would improve quality and marketing options, strengthen the sector, and increase livelihoods. The challenge was to demonstrate what could be achieved with the SCALE approach in only one year with:

- Approximately \$100,000 for in-country costs (provided by USAID/Morocco),
- 2 local full time staff
- \$300,000 in technical assistance and some in-country costs (provided by USAID/EGAT through the AP<sup>3</sup> project)

## The SCALE Process



## WHAT IS SCALE?

SCALE is a systems approach to program management that catalyzes simultaneous action:

- Among multiple players from multiple sectors (economic, environmental, government, and social)
- At multiple levels (national, regional, community, and family)
- Supporting multiple behavioral and technological options
- Through the application of multiple social change methodologies

The **SCALE process** provides a road map to initiate, implement, and evaluate this system-wide development approach. Its components—Map the Context, Catalyze Coalitions and Partnerships, Create Collaborative Sustainable, Solutions, Act, and Value—are briefly described below.

### MAP THE CONTEXT

Define and understand the larger “system” around a development goal by identifying the related environmental, economic, governance, and social issues and the multiple stakeholders related to an issue.

### CATALYZE COALITIONS AND PARTNERSHIPS

The Whole-System-in-the-Room (WSR) planning workshop brings 100 or more stakeholder representatives from the four sectors together to collectively define their common vision and commit to actions to achieve their shared goals. This puts the stakeholders in the driver’s seat from the start and strengthens and expands existing social networks to accelerate the process of going to scale.

### CREATE COLLABORATIVE AND SUSTAINABLE SOLUTIONS

Generate options and negotiate solutions that address the issues identified in Map the Context. By encouraging collaborative actions, SCALE builds the social capital needed for sustainable change.

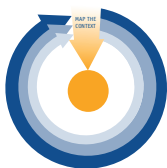
### ACT

Strengthen stakeholders’ capacity to carry out solutions through the simultaneous application of multiple social change methodologies—mass communication, civil society participation and mobilization, advocacy, social marketing, education, organization development, and conflict resolution.

### VALUE

Monitor progress, measure impact, and reintroduce “lessons learned” in a continuing process. Use social network analysis to understand changes in vertical and horizontal communication and relationships throughout the system and to identify leverage points.

# SCALE Hits the Ground



## MAP THE CONTEXT

(August – September 2005)

*Start at the geographical scale that you wish to influence rather than implement “pilot projects” that are to be expanded or rolled out over time.*

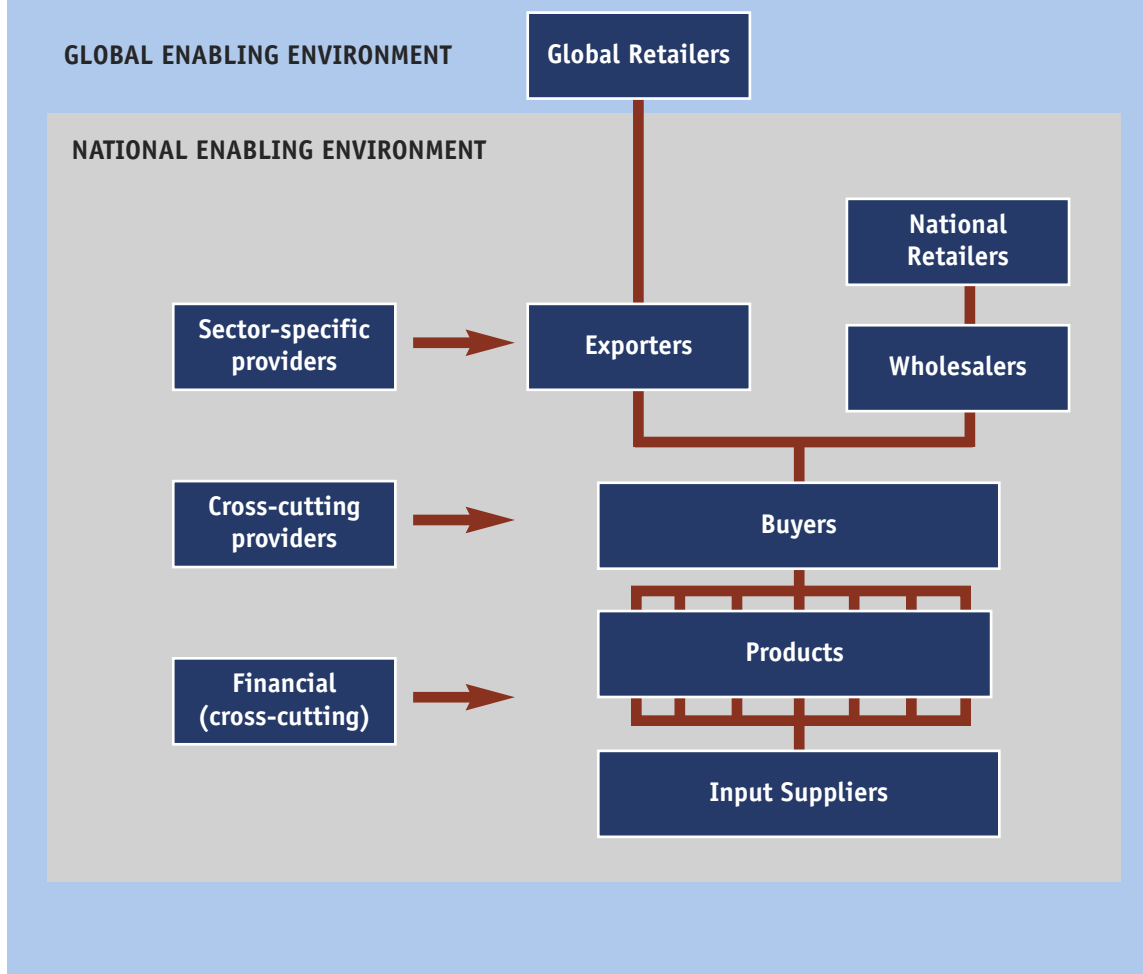
If the issue relates to a productive or service industry, such as strengthening the MAP sector, the Advisory Committee should seek to identify stakeholders from the entire value chain, including the national and global enabling environment.

The SCALE team hit the ground running in late August 2005. Within several weeks it completed an initial analysis of the context and established a SCALE intersectoral Advisory Committee that would support the next steps of the SCALE process. The Advisory Committee included representatives from the Ministry of Agriculture, Ministry of Higher Education, leading MAP research institutions, and the USAID Integrated Agribusiness and Agriculture project (AAI). Collaboratively, they continued to collect and analyze available information, identifying stakeholder groups and individuals to be invited to the Whole-System-in-the-Room (WSR) planning workshop. Getting the right mix of stakeholders representing all four sectors—private, civil society, governmental, and environmental—would be critical to the success of achieving system-wide change.

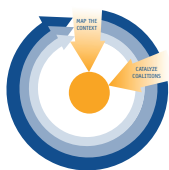
Another critical decision was the task or frame of the workshop. Originally, the project was to focus on one plant, such as rosemary. However, the SCALE team was able to negotiate a wider frame. Interviews with the international MAP buyers had indicated that widening the focus to include all MAPs would strengthen the entire sector.

It was during this step that the SCALE team learned how important it was to be perceived and be able to act as a neutral player in the system, not aligned with any one stakeholder group, including other USAID projects. By being a neutral player, SCALE staff could mediate conflicts, effectively address advocacy issues, efficiently facilitate communication and collaboration among all stakeholders, and move more quickly and flexibly.

# The Value Chain



Kula Olaf, et al., *Globalization and the Small Firm: An Industry Value Chain Approach to Economic Growth and Poverty Reduction* (Washington, DC: USAID, 2006), p. 13.



## CATALYZE COALITIONS AND PARTNERSHIPS (September 2005)

In late September 2005, 120 participants representing eleven MAP stakeholder groups began arriving at the Hotel Ibis in Fez, curious to see what would unfold. They had received an unusual letter inviting them to a workshop entitled “Increasing the Value of Medicinal and Aromatic Plants—Higher Quality and New Markets.” The invitation described opportunities that the new trade agreement offered and continued: “The sector of tomorrow depends on what we do now . . . To develop a coordinated road map for the future, stakeholders of all segments of the Moroccan MAP sector will meet together for a three-day workshop . . . You have been a force for reason and positive influence in the past, and your participation in this workshop is very important.” The letter also stated that eight MAP industry leaders/buyers from the United States and Europe were to participate and share their perspective.

# THE MEDICINAL AND AROMATIC PLANTS SECTOR WHOLE-SYSTEM-IN-THE-ROOM PARTICIPANTS



Participants quickly learned that this was not just another traditional meeting with “expert” presentations, lectures, and some small group work thrown in for “participation.” Within the first hour, they were on their feet collaboratively creating a visual timeline of their common past—the personal, local, and global events that had shaped the current MAP sector. Over the next two days, they continued to self-manage a series of exercises that helped them collectively analyze the present, including global trends, develop ideal future scenarios, and identify eight common-ground goals. Each group then developed a short-term (three-month), and medium-term (three-year) action plan to achieve these common goals. Finally, participants stood in front of their peers and made commitments—personal and organizational—of what they would do to implement these action plans. These commitments and the relationships that were forged during the workshop would be the engine for transforming the sector.

Groups and individuals created a variety of innovative commitments to further the MAP sector. Farmers committed to form the September 22nd Farmers Spokesperson Association to promote MAPs and share information with other farmers. Mr. Najim Itobane, a university researcher, committed to training university students in MAPs. International buyers committed to promote the MAP sector in journals and other publications, create a MAP Web site, and train trainers in MAP organic certification and marketing. Mr. Fabrice Lietaert of the European Community Sahla project committed to conduct MAP demonstration sessions in project sites.

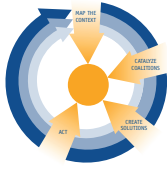
## **Increasing the Value of Medicinal and Aromatic Plants: Higher Quality and New Markets**

### **MAP SECTOR STAKEHOLDERS COMMON-GROUND GOALS**

1. Establish organic certification and labeling.
2. Provide training, information, and research.
3. Promote commercialization and investment.
4. Foster preservation of natural resources.
5. Help shape government policies.
6. Institute insurance and risk management strategies.
7. Conduct monitoring and evaluation

***“You’ll never get those two people in the room together,” some invitees said. “I won’t come if that organization is there,” said others.***

In every setting, there will be existing controversy and disagreements among some members of the system. The SCALE team overcame this constraint by simply asking, “Are they part of the system? If they are, they need to be there. Are you part of the system? Then you need to be there. If you choose not to come, you lose your place at the table and the opportunity to influence the decisions that will be made.” The team also emphasized that the WSR was not going to resolve these conflicts, but rather help the stakeholders find the common ground that they could work on together for reciprocal, mutual benefits.



## CREATE COLLABORATIVE, SUSTAINABLE SOLUTIONS AND ACT (October 2005 – September 2006)

*Work to catalyze **movement in multiples**—multiple sectors, multiple levels, multiple solutions, and multiple social change methodologies—accelerating existing trends and social norms.*

One of the most difficult aspects of getting farmers to comply with higher [organic] standards is for them to understand the needs and benefits of the [organic] process and management plan. The SCALE approach brings more players together to work on this from the start so the farmers and collectors aren't taking risks by themselves—they are part of an entire system that is being restructured.

—PATRICK PAPANIA,  
AP<sup>3</sup> Project Director  
E-mail Communication from Fez,  
March 2006

Following the WSR, a variety of MAP activities began to happen simultaneously, many without the financial or technical support of the SCALE team. The WSR had put the MAP stakeholders in the driver's seat. They were now taking responsibility for the commitments they had made during the WSR and moving forward with their action plans.

The SCALE team recognized that the project would only be in place for a short time while the MAP stakeholders would continue to work together to strengthen the sector long after the project was over. The team felt strongly that their role was to support stakeholder action plans and only implement specific activities that were significant leverage points. Finally, they knew that it would be extremely important to “go where the energy was”—to be able to respond quickly and flexibly when opportunities arose. They developed a two-pronged strategy:

- 1) Strengthen capacity along the MAP value chain to apply the best practices needed to achieve organic certification.
- 2) Strengthen communication, collaboration, and networks among all MAP sector stakeholders and actors at a national level.

To achieve these goals, the SCALE team applied a combination of social change methodologies, including social marketing, education, organization development, conflict resolution, mass communication, and advocacy.

### Organic Certification and Wild-Crafted MAPS

During the WSR, stakeholders emphasized that 70 percent of the Moroccan MAP sector is linked to wild-crafting—collecting plant materials in their natural habitat rather than harvesting cultivated crops. In a survey conducted at the WSR, almost all (93 percent) of the stakeholders expressed concern about the over-harvesting of MAPs from the wild. Therefore, the SCALE strategy focused on organic certification of wild-crafted MAPS in the Oriental forests.

By doing so, the project would help prevent damage to the ecosystem while improving the livelihoods of the many Moroccans involved in wild-crafting activities. The strategy focused on creating awareness about and support for MAP best practices, including:

- Management plans in communities near the forests
- Cultivating a diverse set of indigenous MAP species
- Collecting wild MAPs in more sustainable ways
- Processing the harvest locally according to organic certification standards to create new jobs
- Marketing the higher value products more effectively with increased returns

Project activities focused on strategic leverage points to catalyze actions toward applying best practices. These included:

- **Inter-sectoral seminars on organic certification:** Fifty MAP value chain representatives—local cooperatives, national certification entities, private processing companies, Ministry of Agriculture officials, NGOs, universities, and Department of Forestry representatives—participated in this workshop. Participants learned about the certification process and benefits and developed certification plans for the Oriental region and the national forests managed by two cooperatives.
- **Capacity-building in constructing, using, and maintaining cost-effective distillation units** that comply with international standards of organic certification and that can be made with locally available materials. Local distillation of MAPs adds value to the product and increases rural livelihoods.

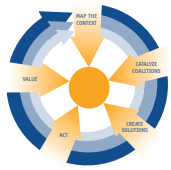
*Use every opportunity (meetings, workshops, and trainings) to bring representatives from multiple sectors (government, civil society, environmental, and private) and multiple levels (national, regional, and local) into the same room for action planning. Diversity is the mother of innovation.*

### **Communication, Collaboration, and Networks**

Starting immediately after the WSR, the SCALE team began to strengthen horizontal communication, collaboration, and networking among the stakeholders who participated in the WSR and new actors as they became involved. Activities included:

- **Fostering on-going discussions** between Moroccan public and private sector MAP stakeholders and MAP international buyers with study tours to stimulate specific new joint ventures.
- **Increasing flow of market information** by connecting European and U.S. MAP industry leaders and buyers with Moroccan suppliers.

- **Providing support for negotiating new agreements.** For example, the SCALE team represented women's cooperatives during marketing discussions about argan oil with a major U.S. buyer and mediated among the Department of Forestry, private sector companies, and local cooperatives of collectors (wild-crafters) to end a three-year private sector boycott of forestry concessions.
- **Facilitating stakeholder engagement meetings** that increased the involvement of additional stakeholders to finalize and implement stakeholder group action plans. This increased the flow of information within stakeholder groups, as well as exchanges among the different stakeholder groups. These sessions renewed stakeholder engagement in the action plans they committed to in the WSR. For example, MAP researchers formed a professional organization to serve as a national-level MAP advisory board. At the end of the project, members combined forces with the Ministry of Agriculture, the Department of Forestry, and the National Institute for MAPs to determine the common goals that should be included in a national MAP strategy. More than 850 people participated in these events.
- **Producing an organic certification video** that served as a tool to raise awareness about how to obtain certification. The video was shown at each stakeholder engagement and outreach meeting and was an important tool in training and other workshops.
- **Encouraging media participation and collaboration** activities that treated the media as partners in the MAP program from the onset with their participation in the WSR. The SCALE team also assisted stakeholder groups to develop and strengthen relationships with the media.
- **Creating a MAP graphic identity and print materials** to promote and brand the initiative and to provide basic MAP information to a variety of audiences.
- **Developing a MAP Web site** with links to other MAP stakeholders' Web sites.
- **Writing and distributing a MAP bi-monthly newsletter** to serve as the flag bearer for the network with highlights, recognition of best practices, and progress reports. The newsletters—produced in French and Arabic—were distributed in hard copies to key stakeholders and posted on the MAP Web site.
- **Initiating telephone calls** with stakeholders to maintain contact and assess needs.



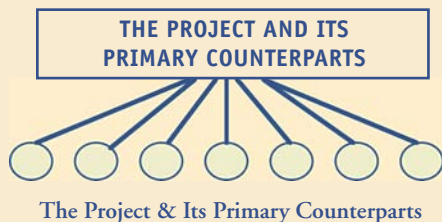
## VALUE

(September 2005 to September 2006)

A systems approach, such as SCALE, generates new types of results and needs new ways to measure those results. Traditional individual behavior change communication programs have one or two target audiences and a limited set of discrete behaviors that are promoted at an individual level. SCALE catalyzes many different kinds of stakeholders to take a variety of actions depending on the role they have in the system. For example, agricultural banks learn about investment opportunities and their role in supporting MAP sectoral growth; and media representatives engage as partners in the efforts, becoming champions, when previously they scrambled for information about related topics. Evaluation of social change programs that use systems approaches is a new field with very limited examples to draw from. The SCALE team used social network analysis (SNA)<sup>2</sup> to map and measure the relationships among the stakeholder organizations. The use of SNA for program evaluation is also a new field. So the SCALE demonstration was ground-breaking in both its implementation and evaluation.

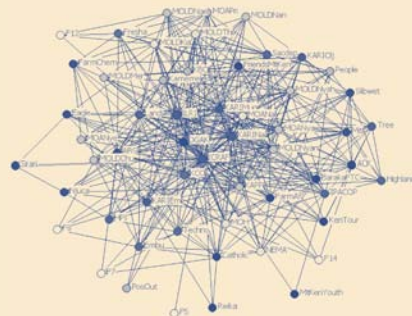
### BUILDING SOCIAL NETWORKS FOR SUSTAINABILITY

In many development projects, project staff and counterparts are the “hub” who then build relationships with specific stakeholder organizations. Instead, by strengthening system-wide relationships and collaborative actions, SCALE creates innovation networks that will continue after the project ends, building sustainability. Following are two SNA maps (sociograms) of networks. The dots are called nodes and represent organizations in the system. The lines indicate a strong working relationship. The first graphic illustrates a traditional project network. The second is a sociogram from the Kenya SCALE demonstration site after one year.



#### TRADITIONAL PROJECT NETWORK

*The project is the hub. The project ends; the network disintegrates. Limited sustainability.*



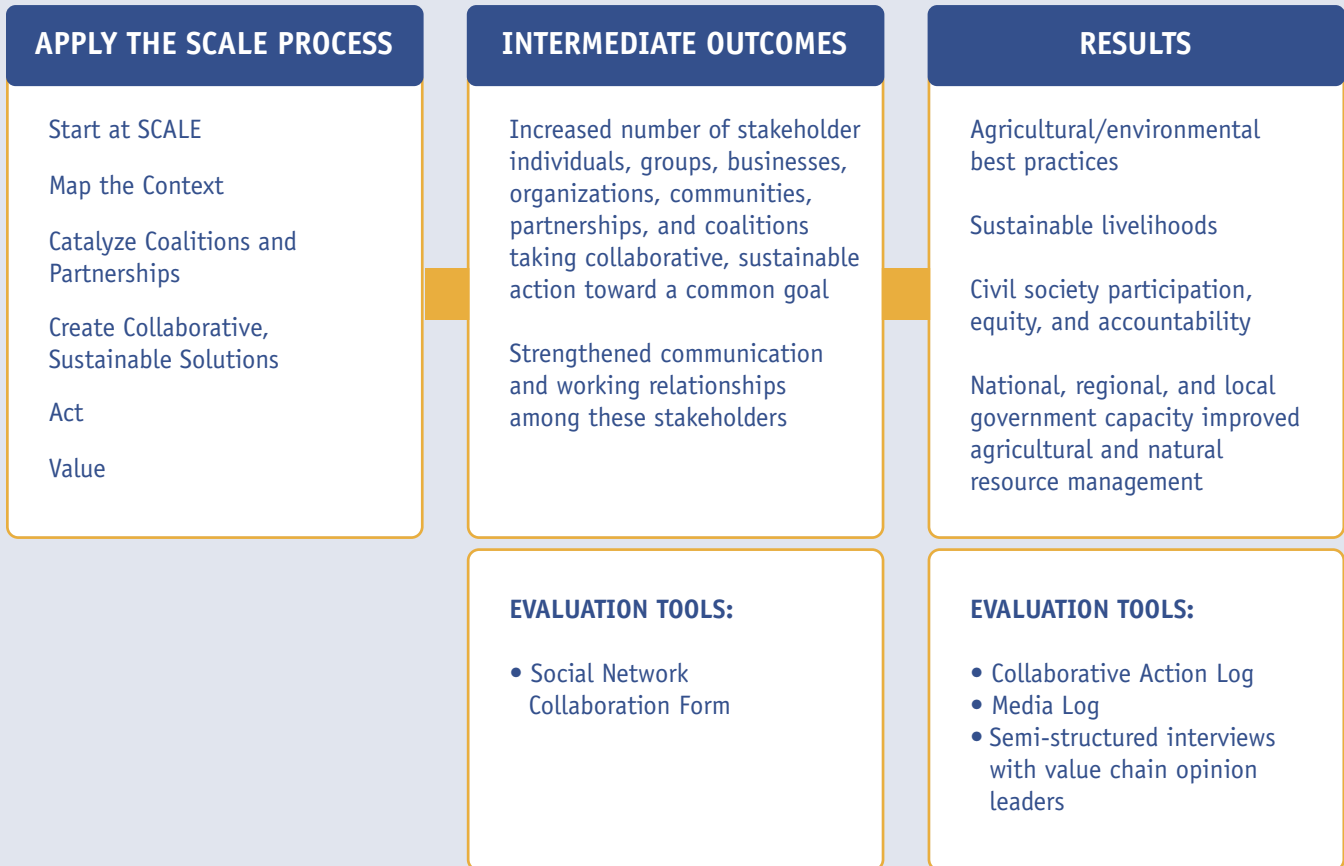
#### SCALE SYSTEMS CHANGE NETWORK

*Multiple hubs throughout the system. The project ends; the network remains. Greater sustainability.*

<sup>2</sup> Social network analysis refers to the analytical process of understanding how individuals or organizations are connected. The field emphasizes the importance of understanding where people and organizations sit within the whole system, what role they play, how they are connected to other organizations, and the potential leverage of change of each within the system.

# SCALE FRAMEWORK AND EVALUATION TOOLS

This graphic illustrates the model that guided design of the evaluation.



## Evaluation Tools

The following describes the evaluation tools illustrated in the framework graphic:

- **Social Network Collaboration Form** collected information by stakeholder group before the September 2005 WSR. Respondents from the organizations were asked to rate their relationships with other organizations within their stakeholder group and then to rate relationships with other stakeholder groups as a whole. For example, distributors were asked to rate their relationship with specific distributor organizations and were then asked about their relationships with farmers or the government as a whole stakeholder group, without specifying any organizations. These data were collected again one year later (September 2006).
- **Collaborative Action Log** was kept by the SCALE team as they became aware of them. The log was used to capture new collaborations as they developed, record brief descriptions of each new collaborative action, and which organizations were involved.
- **Media Log** monitored print media by selecting the major Moroccan newspapers in French and Arabic and searching for articles about MAP, organic farming in general, and organic farming of MAP.
- **Semi-structured interviews** were conducted at three points in time over the project—immediately after the WSR (September 2005), mid-way through the project February 2006, and one year after the WSR (September 2006).

# Results and Lessons Learned

The evaluation demonstrated that “a remarkable amount of work had been done towards strengthening the MAP sector in Morocco in 12 months with minimal funding,”<sup>3</sup> specifically:

- **SCALE built social capital** within the MAP sector in Morocco. Stakeholders saw tremendous value in the relationships they had built. These relationships and connections enhanced their reputation and ability to do work efficiently.
- **The size of the MAP network increased greatly** over the year of project implementation. Sixty percent of respondents reported at least a few new relationships with other stakeholders. Six organizations reported more than 20 new relationships, and two organizations reported 100 new relationships with other MAP stakeholders.
- **The four-year private sector boycott** of the forest concession process ended. This immediately created over 32,000 work days in the first two-month harvest season alone for local residents of the impoverished Oriental region, many of them women.
- A project demonstration distillery, now owned and operated by the Jereda cooperative, improved the quality of rosemary oil, which allowed them to **increase the price** from \$20 to \$80 a liter.
- **The MAP sector was more “organized.”** At the beginning, the project lacked linkages and coordination among MAP stakeholders. Many stakeholders were unaware of the organizations working in the MAP sector and their role in the value chain. Information flowed poorly among MAP value chain actors. A year later, there are indications of greater awareness of the variety of stakeholders in the MAP sector and the role they play in the value chain. Respondents often commented that the sector was now more “organized.”

---

<sup>3</sup>Karabi Acharya, et.al, *Morocco, Maps, and Centrality: Building Social Capital through SCALE™: Evaluation of the Agriculture Partnerships for Productivity and Prosperity (AP<sup>3</sup>) Project* (Washington, DC: AED/USAID, 2007).

- **The private sector was more engaged and connected to other stakeholders.** Parts of the private sector were not connected to the rest of the MAP system. For example, many processing companies were working in isolation. After one year, the private sector had become more engaged and had built connections with other stakeholders in the MAP system.
- **The media was critical in facilitating the flow of information and maintaining interest in the sector.** There were 141 print articles about MAPs and the project during a one-year period. If the project had paid for this print coverage at advertising rates, it would have cost over US\$167,000. In other media, there were twenty radio broadcasts and fourteen TV broadcasts on issues related to MAPs and the project, all unpaid.
- The project's ability to **"go where the energy was"** was critical to its success. The project was able to balance implementing specific, targeted activities with leveraging new opportunities. For example, the project could not have anticipated the request to help mediate discussions that could end the private sector boycott. However, when the opportunity arose, the team responded quickly. The SCALE approach is unlikely to be successful if it is unable to respond opportunistically, flexibly, and innovatively to system changes.
- **Neutral parties were powerful catalysts.** Respondents frequently mentioned that the neutral status of the project enabled it to mediate conflicts and move beyond past disagreements. SCALE facilitators and implementers must remain neutral players within the system, not linked philosophically to any one stakeholder group or limited by another project action plan. The project was not closely associated with any one stakeholder, which lent it tremendous credibility with all stakeholders. This differs from traditional agriculture projects, where the project is often closely allied with the Ministry of Agriculture.

Raising the level of understanding of organic certification raised understanding of the need for greater collaboration along the value chain.... Private sector concessionaires now realize that they cannot simply exploit natural resources if they intend to reach attractive external niche markets.

—PATRICK PAPANIA,  
AP<sup>3</sup> Project Director  
*E-mail Communication from Fez, March 2006*

**Challenges remain** in strengthening the MAP sector. However, in a remarkably short period of time Moroccan MAP stakeholders made great strides toward a more formalized sector that contributes significantly to local economy and better lives. The SCALE demonstration proved that addressing international development issues through a systems approach and catalyzing **movement in multiples**—multiple sectors, multiple levels, multiple solutions, and multiple social change methodologies—*can* achieve broad development impact and transform lives.

# Implementing SCALE Checklist

This checklist gives some of the guiding principles that both drove and emerged from the SCALE demonstrations in Kenya and Morocco. They are intended to serve as a point of departure for future programs.

- Start at the geographical scale you wish to influence** rather than “pilot projects” that are to be expanded or rolled out over time.

---

- Start with **the frame of a broad development goal** rather than a specific solution (technology, behavior).

---

- Identify and analyze the system (**the social, environmental, economic, and governmental sectors**) related to the development goal, including the issues related to that goal and all of the stakeholders related to each issue.

---

- Bring **representatives from stakeholder groups of all four sectors** (including the media, businesses, and other donors) **into a Whole-System-in-the-Room (WSR) planning workshop at the onset** of the project to define their common-ground goal and commit to collaborative actions toward their common goal. Use every opportunity (meetings, workshops, trainings) to bring representatives from multiple sectors and multiple levels into the same room and experience. Diversity is the mother of innovation.

---

- Starting immediately after the WSR, strengthen horizontal communication and social networking among stakeholders.** Normally, project staff and counterparts are the “hub” who then build relationships with specific stakeholders. Instead, strengthen system-wide relationships and collaborative actions. Create innovation networks that will continue after the project ends, thus creating sustainability.

---

- Work to catalyze **movement in multiples**—multiple sectors, multiple levels, and multiple solutions—accelerating existing trends and changes in societal norms.

- Put the **stakeholders related to the development goal in the driver's seat** of deciding how the system should organize.

---

- Ensure that the project strategy and staff support stakeholder action plans. Implement in a way that acknowledges the **project as a transitory stakeholder** in a system of inter-related relationships that will continue long after the project is over.

---

- Ensure that the project strategy and staff **remain neutral players in the system** and don't become linked to one stakeholder group (including other donor projects). This may mean having a separate office from the traditional ministries or other donor projects.

---

- Apply **multiple social change methodologies simultaneously**, including social marketing, mass communication, conflict resolution, education, civil society participation, and organization development.

---

- Maintain a pioneering attitude, implementing the project with the **flexibility and freedom to be opportunistic**.

---

- Include **increased social networking (number and strength of relationships) and the creation of social capital throughout the system as outcomes** for project success and measure them as part of the monitoring and evaluation plan.



Connecting People > Creating Change

1825 Connecticut Ave., NW

Washington, DC 20009

Tel (202) 884-8000

Fax (202) 884-8400

[www.aed.org](http://www.aed.org)

AED is a nonprofit organization, working globally to improve education, health, civil society, and the environment—the foundation of thriving societies. In collaboration with local and national partners, AED fosters sustainable results through practical, comprehensive approaches to social and economic challenges.

AED implements more than 250 programs serving people in more than 150 countries and all 50 U.S. states.