



17 January 2020

The r4d synthesis project on “*Dealing with complexity in research for development: Experience capitalization*” is looking for an experienced documentarist (or a team).

**Deadline for submission: 13 March 2020**

Contact person:

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## r4d Programme Synthesis:

### Dealing with complexity in research for development: Experience capitalization (CapEx) in the r4d programme

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## Terms of Reference for the Documentarist

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### 1. Background

The Swiss Programme for Research on Global Issues for Development (r4d programme) is a joint funding scheme of the Swiss Agency for Development and Cooperation (SDC) and the Swiss National Science Foundation (SNSF). The r4d programme is organised around five thematic modules (employment, ecosystems, food security, social conflicts and public health) and one thematically open module. The 57 projects funded in the r4d programme focus on reducing poverty and global risks as well as on contributing to global sustainable development (<http://www.r4d.ch/>).

During the period from 2018 to 2022, the r4d programme conducts a synthesis process that facilitates learning beyond individual projects. One of the synthesis streams is the capitalization of experiences in dealing with complexity (CapEx).

There is increasing recognition that complexity-aware projects and interventions are essential for sustainability transformations. However, dealing with complexity is challenging because a) capacities and competences needed for tackling complex problems are distributed across disciplines and stakeholders acting at different scales; b) projects and interventions dealing with complexity need flexibility to adapt to and use emerging insights; and c) complex problems can involve conflicting goals.

Aware of these challenges and recognising that the 57 projects from r4d programme provide an extraordinary opportunity for learning about how to deal with complexity in research for development, the r4d programme will conduct a capitalization of experiences as one of its synthesis streams.

## **2. Capitalization of Experiences (CapEx)**

Capitalization of experiences is a process that allows the “experience holders” (individuals or groups) to learn from their practical experiences in a particular field (here: r4d project teams in dealing with complexity). This learning happens through jointly identifying “promising practices” and formulating lessons to be followed – so called “lessons to be learnt” - by themselves or a wider community in future, leading the “change” aspired ([SDC Tool Box Experience Capitalization](#)).

In the context of the r4d programme synthesis, the CapEx stream will have the following phases:

- Phase 1: Preparation of learning cases
- Phase 2: Regional workshops aimed at sharing experiences from the learning cases and eliciting promising practices, methods and tools for dealing with complexity in research for development
- Phase 3: Validation of the results from regional capitalization workshops
- Phase 4: Dissemination of the products of the CapEx to a wide community; and After Action Review

A detailed design of the capitalization of experiences is available.

## **3. Tasks for documenting the CapEx**

The mandated documentarist (team) will record both, the capitalization process and the capitalization outputs including conclusions and recommendations, lessons learned and promising tools and methods for dealing with complexity in research for development.

The concrete tasks are:

- To document the capitalization process including the learning cases, the regional workshops and the validation activities
- To contribute to the elaboration of a dissemination concept and to propose and test formats for documenting the capitalization process and outputs
- To elicit jointly with the facilitators and the participants of the regional workshops and of the validation activities the key conclusions, recommendations and lessons learned
- To support the co-leaders in identifying promising methods and tools for dealing with complexity in research for development (capitalization outputs)
- To prepare dissemination products (e.g. infographics, factsheets, good practices, method descriptions or short films) that can be disseminated online, in social media and in face-to-face events

In order to undertake these tasks the documentarist will work in close collaboration with the co-leads of the CapEx project, support the documentation of the learning cases and participate in all regional workshops and validation activities.

## 4. Deliverables

The following deliverables are expected:

- Documentation of the learning cases (until early 2021)
- Documentation of the regional workshops. The documentation should include insights into the process and the evolving/emerging lessons and promising tools (2021 and 2022)
- Dissemination products, developed in adequate and tested formats for specific target audiences (from 2021 onwards), i.e.:
  - Catalogue of lessons learned and recommendations
  - Catalogue of promising tools and methods for dealing with complexity in research for development
  - Documentation of the capitalization process highlighting the opportunities and challenges of the process

Publication and outreach of any deliverable follows agreement for publication under the creative commons 4.0 licence. All products will be widely disseminated.

## 5. Application details

### 5.1 Who can apply

Experienced documentarists or teams of two people can apply in this call for a documentarist. The following competences are expected:

- Proven expertise in documentation of participative processes and in capitalization
- Proven expertise in knowledge management methodologies
- Demonstrated experience in developing dissemination products in formats suitable for diverse target groups and multiple dissemination channels (e.g. social media, online platforms or face-to-face meetings)
- High intercultural competences
- Proficiency in English and good command of French; good command of Spanish is advantageous
- Excellent editorial capabilities in English
- Excellent team player with proven communication skills

### 5.2 Duration

This mandate will be implemented over the period from April 2020 to December 2022. A maximum of 85 days have been allocated for this mandate.

### 5.3 Budget

The maximum budget for this mandate is CHF 85'000. Travel and other operating costs are additional. International travelling is foreseen for this mandate.

## 6. Submission procedure

### 6.1 Information and inquiries

These Terms of Reference are published on 20 January 2020. Questions related to the submission and evaluation procedures can be sent by email to [r4d@snf.ch](mailto:r4d@snf.ch) until 10 February 2020. Proposals have to be submitted electronically **by 13 March 2020 to [r4d@snf.ch](mailto:r4d@snf.ch)**.

### 6.2 Documents to be submitted

- Motivation letter and CV(s) of applicant(s), including short statements about your views on the specific contribution of the documentarist (team) for each of the phases outlined in section 2, considering the above listed tasks and expected products
- Financial proposal
- Reference work, including recent samples of own products, as proof of competences listed in 5.1
- Two names of reference persons

### 6.3 Timeline

- Terms of Reference published 17 January 2020
- Questions by e-mail 10 February 2020
- Deadline for submission 13 March 2020
- Interviews 26 and 27 March 2020
- Communication to candidates 31 March 2020
- Contracting April 2020

## 7. Evaluation and selection of proposals

The selection of the documentarist is jointly done by the following persons:

- CapEx project co-leaders: Dr. Manuel Flury and Dr. Carmenza Robledo
- r4d programme coordinators: Dr. Claudia Zingerli or Dr. Claudia Rutte

Proposals will be evaluated according to the following table provides an overview of the evaluation criteria and the corresponding weighting:

No.	Award criteria	Weighting
1	Quality of the documents submitted	40%
2	Demonstrated expertise and capacity	30%
3	Formal quality of offer (structure, completeness, appearance)	10%
4	Financial proposal	20%

Each criterion will be evaluated according to the following score table:

Score	Fulfilment and quality of the criteria	
100	Very good fulfilment	Information clearly relates to the achievement of outputs; data quality is excellent
80	Good fulfilment	Information focuses well on requirements; data quality is good.
50	Average fulfilment	Information globally responds inadequately to the requirements; data quality is adequate.

30	Bad fulfilment	Information reveals inadequately to the requirements; data quality is poor.
15	Very bad fulfilment	Information is insufficient; data quality is very poor.
0	Cannot be established	Information has no significance, is not included or is not understandable.

## 8. Organisation roles and responsibilities

The mandatee (documentarist) is responsible for the implementation of all tasks mentioned in section 3 and makes available all deliverables (section 4) on time. The mandatee is part of the CapEx team and will receive guidance from Manuel Flury and Carmenza Robledo, the CapEx project co-leaders.

The r4d programme is the project owner. The r4d Steering Committee provides strategic guidance for the whole programme and is regularly informed about progress of all synthesis activities.

The r4d programme management is responsible for administrative issues of the mandate (e.g. contracting and payment).

## 9. Contact

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