

**Evaluation of the
Canada-Latin America and the Caribbean Research Exchange Grants
Programme (LACREG)**

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**For
The Association of Universities and Colleges of Canada &
the International Development Research Centre**

Final Report

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Table of contents

Acknowledgements	P.4
Acronyms	P.5
Executive summary	P.6
1.0 Background	P.13
2.0 Purpose of the Evaluation	P.14
3.0 Evaluation Methodology	P.15
3.1 Select Aspects of Substance	
3.2 Select Aspects of Process	
3.3 Is the current program the best option for IDRC and for AUCC?	
3.4 Evaluation Tools and Activities	
4.0 Initial Document Review	P. 18
5.0 Questionnaires	P. 19
5.1 Response rate	
5.2 Canadian LACREG Grant Recipient Respondents	
5.3 LAC Respondents	
5.4 ILO Respondents	
5.5 Selection Committee Members	
6.0 Case Studies	P.25
6.1 Canadian Interviews and Case Studies	
6.1.1 Rationale for Selection of Canadian Interviews and Case Studies	
6.1.2 Montreal	
6.1.3 Toronto	
6.1.4 Overview of Findings from Canadian Interviews and Case Studies	
6.2 LAC Case Studies	
6.2.1 Rationale for Selection of LAC Case Studies	
6.2.2 Cuba	
6.2.3 Costa Rica	
6.2.4 Colombia	
7.0 Summary of Findings from all Tools and Activities	P.36
7.1 Aspects of Substance: Summary of Key Findings	
7.2 Aspects of Process: Summary of Key Findings	
7.3 IDRC and AUCC	
8.0 Recommendations	P. 42
9.0 Conclusions	P. 45
Annex 1	Individuals Interviewed in Support of the LACREG Evaluation P.46
Annex 2	List of Documents Consulted During Initial Document Review P.50
Annex 3	Questionnaire templates P.51

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Acronyms

AUCC	Association of Universities and Colleges of Canada
CERLAC	York University's Centre for Research on Latin America and the Caribbean
CIAT	Centro Internacional de Agricultura Tropical
CIDA	Canadian International Development Agency
CP	Canadian Partner
CUJAE	Instituto Superior Politécnico José Antonio Echeverría
IDRC	International Development Research Centre
ILO	International Liaison Officer
LAC	Latin America and the Caribbean
LACREG	Canada-Latin America and the Caribbean Research Exchange Grants
NGOs	Non Governmental Organizations
MOU	Memorandum of Understanding
UPCD	University Partnerships in Cooperation and Development
UQAM	Université du Québec à Montréal

Executive Summary

The Canada-Latin America and the Caribbean Research Exchange Grants (formerly Links) Programme came into being in 1995. The objective of LACREG is to allow Canadian and Latin American and Caribbean researchers to collaborate together on development issues of mutual concern and to learn more about each other. LACREG is funded by the IDRC and administered by the AUCC. LACREG had not been the focus of an evaluation since 1998. Both agencies felt the timing was right to undertake another review of LACREG. From 1998 to 2006, over 130 grants were awarded spanning three programming phases. This evaluation would be undertaken during the two-year fourth phase of LACREG.

The purpose of this evaluation is to review LACREG's impact and to propose changes to the programme in order to improve selected aspects of substance and process. It is also important to understand the relationship between LACREG and the current broader developmental context. Given the regional and global context in which LACREG operates, one needs to assess whether LACREG is relevant within the current larger scope of IDRC priorities, and as well as in relations to the priorities of the university community. The evolving nature of relations between Canada and LAC – and its impact in terms of creating challenges and opportunities for LAC and Canadian researcher – needs to be better understood. It is crucial to comprehend what role LACREG is playing compared to other grant programmes and whether there is a need to make it more contextually relevant. There are other broader development issues to consider such as LACREG's ability to respond to gender issues and if necessary, suggest ways to increase and improve attention to gender issues.

The most important objective of this second evaluation of LACREG is assessing the nature and durability of partnerships and understanding the factors contributing to successful collaborations. This will lead to the formulation of changes that may be required in relations to the programme processes like candidate selection, monitoring, and reporting.

Ultimately, this second LACREG evaluation examines if and how LACREG is allowing researchers and students to meet their objectives and what the programme could do to improve upon this. The cultivation of mutual respect is an important part of the LACREG mandate. Hence, understanding whether or not the programme is having any impact on the culture of relationships between the Canadian and the LAC research communities, beyond the projects themselves, is vital.

This second performance review of LACREG would, if necessary, propose changes to the programme in relation to design, communications and outreach, selection process, programme management, and nurturing forms of collaboration. It is important to understand whether the design of the programme is appropriately aligned with its objectives. In a programme that attempts to reach out across the Americas, it is important to be assured that the objectives and themes are being clearly stated and understood and that LACREG is reaching its target audience, especially in LAC.

Examining the selection process would also be of importance in terms of understanding how it is now aiding or detracting from the objective of identifying and advancing qualified applications. Another key result that has to be assessed is the capturing of additional funding. Knowing to what degree LACREG has given birth to larger endeavours eventually supported by agencies such as IDRC, CIDA, Canadian Research Councils, foreign foundations and donor agencies is important as is understanding what changes could be brought to LACREG to bring further

success to each grant.

From September 2006 to July 2007, a performance review was undertaken of LACREG that involved missions within Canada and to Cuba, Costa Rica and Colombia. The following are the evaluation's findings and recommendations.

Key Findings

1. Understanding the Relationship with the Broader Context

LACREG is filling an important role in terms of filling funding gaps by facilitating the strengthening of relationships and maintaining ongoing relationships while contributing to research.

For countries like Cuba and Colombia where donor support is limited, having access to LACREG is critical and highly appreciated. A programme like LACREG allows relationships to be strengthened while hoping that more substantive funding can be found. At a minimum, LACREG helps to establish a connection to the broader context beyond these countries.

2. Nurturing Sustainable Collaborations

There can be no doubt about the importance of LACREG both for Canadian and LAC stakeholders. The programme is playing an important role in reinforcing and advancing partnerships between Canadian and LAC academics. LACREG does not always lead to formal projects or institutional partnerships. However, in most cases, professional contact is maintained after the LACREG experience. In some cases, long term professional contact has led to larger partnerships.

From a Canadian perspective, even if an institution does not have a strong or stated interest in LAC, a department or individual professors may have. In those cases, most academics speak highly of their LACREG experience and their ongoing professional relationships in LAC. This is by no means a worrisome situation. It speaks more about the size and varied nature of Canadian academic institutions and the dynamics of international activities.

LACREG clearly has a capacity to have a tremendous impact. However given the small amount of money, one has to be wary about how much to expect from the standpoint of strengthening partnerships.

3. Attention to Gender Analysis

The number of women applying for and obtaining LACREG grants is increasing. It is in the interest of all that this trend of growing female involvement be maintained.

One practical consideration that was raised related to female LACREG grant recipients was that more flexible start and end dates would be attractive for people with familial commitments (e.g. female researchers with small children) who do not wish or cannot be away for extended periods of time from their families.

What is not clear is how effective the gender equality requirements as prescribed in the application form are. Researchers working on issues such as scientific investigations in a laboratory or conducting wildlife inventory feel that their work is gender neutral. In these cases,

applicant are complaining that the application process does not work in their favour because their scores are lower compared to other proposals that have a more active gender component.

There was one suggestion that in the selection criteria that the gender focus be integrated into a broader category of equity and development.

4. Meeting Recipients' Objectives

Tying the grant to IDRC's developmental objectives is encouraging research in a wide variety of development fields conducted by an interesting mixture of Canadian and LAC researchers and academics.

The open ended nature of LACREG that supports a wide variety of grant recipients to pursue an equally broad range of interests is highly appreciated by grant recipients even if people in certain quarters would like to see LACREG more pro-actively serving as a platform for project funding.

Some of the benefits of LACREG involve professional development such as language skills. Even if it is not the goal of LACREG, professional development is an important contribution of the program.

For the amount of money provided with each grant, many Canadians and LAC recipients feel that too much is expected in terms of building long-term partnerships.

5. Cultivating Mutual Respect

A key conclusion to be drawn from this evaluation is that there is high mutual respect between Canadian and LAC academics. Canadians see their LAC counterparts as their equals and understand that it is often a question of having better access to information, technologies and other material resources that causes them to be ahead of their LAC counterparts on some levels.

6. Coherence of Design

There is a desire to see LACREG change. The most evident modification would be to increase the funding of each grant. This could allow academics to stay longer in the host country or provide some flexibility with regards to other research-related costs.

There is a wish to see LACREG linked to larger funding sources. However at the same time, there is support and clear evidence of the benefits of LACREG supporting straight field research.

There also is interest in seeing some form of a two-tier LACREG system that would link an initial LACREG grant to a larger source of funding.

Changes in the reporting process are wanted by many as the reporting requirements are seen as being excessive given the size of each grant.

Other desired changes related to LACREG's lack of flexibility with regards to the conditions – and especially timeline – under which the grant can be used.

7. Communications and Outreach

People learn about LACREG through a variety of methods ranging from word of mouth to Internet searches. The only way to ensure that LACREG has greater exposure is to actively promote it. There is a lot of room even in countries that are relatively more aware of LACREG to promote it more thoroughly. This evaluation has definitely served this purpose.

There was a surprising lack of awareness amongst Canadian grant recipients, ILOs and LAC grant recipients that LAC-based academics can also apply for a LACREG grant. Individuals would often complain about how LACREG was a one way street before having the reality pointed out. It seems to be more a question of people not paying attention to the fine print in terms of understanding the options provided by LACREG as opposed to there being an assumption that LACREG follows the standard accountability patterns established by CIDA and other Canadian funding agencies.

There appears to be a lot more options for promoting LACREG within LAC. This evaluation revealed a number of avenues in the 3 countries visited.

There is no easy explanation as to why there are more grant recipients in the area of natural resource management and environment field than in relation to other IDRC priorities. It boils down to word of mouth and networking patterns that have no overriding guidance.

8. Selection Process

The manner in which selection committee members have been rightfully evaluating proposals does not necessarily correspond with how eventual grant recipients view their LACREG experience. Where the selection committee members are concerned about strengthening partnerships and ensuring developmental impacts, applicants certainly want to address these objectives but they are also very aware of issues such as specific research objectives and professional development.

There is no practical reason to explain the relative domination of successful environmental and natural resource management related LACREG grants. Part of the explanation relates to the importance of the environment both as a stand alone and cross-cutting issue.

9. Forms of Collaboration and Capturing Additional Funding

The following chart is a summary of the types of partnerships identified through the evaluation. The most important comment to be made is that as the grants are used in such a variety of ways and circumstances, it is not surprising to see that there is an equal array of types of partnerships.

Types of Partnerships Identified Through Evaluation
(Results obtained from Questionnaires and Case Studies)

Types of Partnerships	Occurrence	Rate
Maintaining ongoing relationship through correspondence with exchanges or continued field research, but no other significant financial support	13	36%
Formal MOU signed with possibility of ongoing academic exchange (sometimes through a formalized on going mechanism), but no other significant financial support	5	14%
Maintaining ongoing correspondence while still actively pursuing other funding opportunities	4	11%
Led to other joint activity (e.g. ongoing field research or academic exchange) without a significant source of funding	3	8%
Maintaining ongoing correspondences through informal means such as electronic mail, without perspective of substantial funding or project activity	3	8%
Contact is not maintained but the Canadian partner has found a new counterpart in the host LAC country	3	8%
Led to formal project activity with significant funding and a broaden range of exchanges and collaboration between Canada and the LAC partners	2	6%
Additional grant money was secured to maintain and strengthen the partnership, allowing ongoing research	1	3%
Led to formal project activity with significant funding	1	3%
Contact is not being maintain	1	3%

Recommendations

1. Regarding the Administration of LACREG

It is recommended that the current administrative model where AUCC oversees the day the day management of the programme be retained. Although this is an IDRC-funded programme, having AUCC oversee LACREG presents the on-going possibility to promote it within the broader and favourable context of all the different international programmes that the association administers.

It is recommended that the current approach that allows for a wide range of grant recipients to apply for LACREG be maintained. The strength of LACREG is the diversity of people, research areas and circumstances in which the grants are used.

2. Regarding Funding Levels

It is recommended that the overall funding envelope be expanded to increase funding arrangements and the annual number of recipients.

More specifically, it is recommended that the maximum size of each grant be increased to allow

the possibility of longer stays in the host country or to cover other justifiable expenses. This is especially important for potential LAC recipients coming to Canada who may be discouraged by, the high cost of temporary housing for example.

3. Regarding the Establishment of Two Streams of LACREG Grants

In the spirit of trying to respond to both institutional aspirations and continuing to contribute to the professional development of researchers and academics, it is recommended that AUCC and IDRC consider establishing two streams of LACREG funding:

- Stream One: The first stream would be focussed purely on professional development allowing the candidates to develop research and language skills while gaining valuable field experience in either Canada or LAC. In this stream, the grant recipient would not be burdened with any excessive pressure to build sustainable institutional partnership. The grants would be awarded based on potential developmental impacts and alignment with IDRC's developmental priorities. This first stream would be possibly directed mostly at younger academics.
- Stream Two: The second stream would award larger grants, perhaps double the amount of the first stream. The focus would still be joint research but there would be a stronger expectation that a sustainable partnership would emerge. Applicants would be expected to ensure that both the LAC and Canadian partners travel and work in each other's country.

Partners choosing the First stream of professional development would have the option in subsequent years to have the partner who did not travel to apply to the Second stream of the LACREG programme. For example, a Canadian travels to Honduras conducts research and returns to Canada. Two years later, the Honduran partner could apply to come to Canada to solidify a relationship. However, the application process would be subject to the more rigorous criteria found in the Second stream of the LACREG programme.

4. Regarding the LACREG Application Process

It is recommended that IDRC and AUCC study how the application process can be simplified to address the key criticism of labour-intensiveness given the small amount of money that is awarded. This should include possibly studying how criteria like gender impacts could be better integrated into the application and selection process.

It is recommended that IDRC and AUCC study removing the requirement of counterpart funding. In the absence of the removal of this condition, it is recommended that time is taken to identify innovative ways that one might make an in-kind contribution that enhances the overall LACREG experience. For example, giving credit for language training leading up to the LACREG experience would seem to be a very reasonable contribution that furthers the goals of the programme.

It is recommended that in the absence of accepting the recommendations to establish a 2-stream approach, IDRC and AUCC study how each LACREG grant could ensure greater movement between countries. As it stands right now, it is very common for LACREG grant recipients to share the grant with their partner to allow 2-way travel. It may be possible to formerly recognize this possibility in the grant application process and accommodate it financially by providing slightly larger grants.

Regardless of the form that LACREG takes in the next round of funding, it is recommended that IDRC and AUCC address concerns relating to establishing more flexible timing for the start and finish times for LACREG.

It is recommended that LACREG administrators establish procedures to ensure there is no confusion or misunderstanding either on the part of grant recipients or their partners on matters such as the

- need for LACREG grants to be used for research purposes;
- fact that research results emanating from LACREG grants are properly shared amongst all stakeholders; and
- fact that practical matters like the conditions related accommodation in the host country are understood by all parties.

5. Regarding Gender

It is recommended that IDRC and AUCC monitor closely the ratio of female LACREG grant recipients. In the event that the number of female grant recipients and applicants begins to decline, LACREG administrators should be prepared to establish promotional activity that specifically targets female researchers and academics in both Canada and LAC.

6. Regarding Promoting and Broadening the Reach of LACREG

It is recommended that LACREG administrators continue to maintain a strong promotional strategy in LAC. This strategy could occasionally include events and forums that provide an exceptional opportunity to promote the LACREG programme. A case in point would be the Latin American Researchers Convention to be held in Montreal in September 2007.

It is recommended that there be an increasing openness towards promoting LACREG amongst non-traditional partners such as NGOs that may conduct beneficial research, contribute to professional development and build sustainable relationships. The same academic standards would apply.

7. Regarding the Reinforcement of the LACREG Experience

It is recommended that LACREG administrators consider establishing an Internet site that would be exclusively dedicated to LACREG. In addition to providing updated information on LACREG and other matters like application forms, the site could serve as a clearinghouse on information on other grant programmes that compliment LACREG. The site could also serve as a mechanism for sharing the LACREG experiences of grant recipients possibly in the form of a multilingual blog. The site could also serve as a constant tool in promoting LACREG.

1.0 BACKGROUND

The Canada-Latin America and the Caribbean Research Exchange Grants Programme (formerly Links) was launched in late 1995 to allow Canadian and LAC researchers to learn about each other and collaborate on development issues of mutual concern. LACREG is an initiative funded by the IDRC and managed by the AUCC. Some 68 grants were allocated over the first, three-year phase through five categories of travel grants. In mid 1998, a second four-year phase was launched to strengthen international partnerships and consolidate existing and emerging networks among academic researchers. Informed by an evaluation of the first phase, LACREG reviewed its grant categories and eligibility criteria for applicants. During the second phase, 56 grants were allocated to proposals aligned with one or more of IDRC's thematic areas of priority at the time. A third, three-year phase was launched in 2003, to further support emerging North-South collaborations, giving priority to proposals aligned with one or more of IDRC's three areas of thematic priority at the time. A total of 61 grants were allocated over this period. The fourth phase began in 2006 and is set to end in 2008. This evaluation is part of the fourth phase of the LACREG programme.

The current objectives of LACREG are:

- to support small collaborative research activities which will contribute to the creation, dissemination and sustained application of knowledge for the development process in at least one of IDRC's areas of thematic priority;
- help to ensure the sustainability of research linkages, activities and results through explicit commitments from all partner institutions to (i) a plan of action for research collaboration and (ii) the proposed joint research activities.

Patrick Hyndman of AUCC's International Relations Division carried out an internal evaluation of Phase I of this programme in 1998. It identified some important obstacles and complementarities in research cooperation between Canada and LAC. This evaluation did not question the objectives of the programme but the extent to which the means used had enabled the programme to reach its stated objectives. The evaluation reviewed the results of the types of activities supported by the programme to reach its objectives (grants to Canadian and LAC lecturers, Canadian graduate students and LAC graduate students). It also reviewed the thematic and geographic coverage of the programme, the communication strategy to circulate its guidelines, its selection committee, and the types of activities funded.

2.0 PURPOSE OF THIS EVALUATION

From an IDRC viewpoint, the Centre has invested 1.2 m \$CDN over three successive phases since July 1995. As a result of the 1998 evaluation, some changes were brought to the substantive objectives and operational aspects of the programme. In terms of programme outcomes, more time has now elapsed since the completion of activities funded in Phases I and II of the programme. The Canadian partners consider that an external evaluation is justified at this time, both for accountability and decision-making on the future of this programme. Therefore, IDRC as its funding agency and AUCC as its manager have been interested in an external evaluation that will be both retrospective and prospective.

Hence, an evaluation would be conducted of the LACREG programme and its relevance and usefulness. This would not be an evaluation of AUCC and how it managed the programme; IDRC considers that the programme has been generally well administered, with AUCC always willing to engage with IDRC staff about how the programme was unfolding, critical in its analysis of the process, and willing to undertake on-course adjustments as required.

3.0 EVALUATION METHODOLOGY

Below is the methodology used for this evaluation.

3.1 Review performance and propose changes to the programme in order to improve this performance, on select aspects of substance:

- *Understand the relationship with broader context:* What is the regional and global context in which LACREG operates today? Is the programme relevant within the current larger scope of IDRC priorities, university community priorities, regional and global context? What are key opportunities and challenges concerning collaboration between Canada and LAC researchers, considering the evolution of overall relations between Canada and LAC? Does it complement or duplicate other programmes? Should the programme be made contextually more relevant? Can LACREG help buttress these opportunities and to address the challenges? Can it be made more synergetic in its interaction with other programmes? If so, what changes need to be brought to the programme?
- *Nurturing sustainable collaborations:* Since 1998, has the programme made it possible for a higher share of all its activities to design Canada-LAC collaborative research proposals, to secure funding for these and to carry out more collaborative research projects? Beyond projects, has it helped to set up or consolidate more research networks? What elements have made some collaboration more sustainable than others have? Given this, can the programme increase chances for collaborations to be more sustainable? If so, at what stage should changes be made (design, call, selection, monitoring, reporting)? What can be done by the various instances to bring about these changes (IDRC management, AUCC management, selection committee, partner universities, etc.)?
- *Meeting recipients' objectives:* Are the grants really allowing researchers and students to meet their objectives? If so, why, and if not, why not? Is there more that the programme could do to improve this correspondence? If so, what changes need to be brought to the programme?
- *Cultivating mutual respect:* Has the programme had any impact on the culture of relationships between the Canadian and the LAC research communities, beyond the projects themselves? Has it had any discernable effect on LAC scholarship as a whole in Canada? If so, why? If not, why not? What are changes needed, if any, to the programme in order to improve the programme's outcomes on this front?
- *Attention to gender analysis:* Since the 1998 evaluation, has the LACREG programme been addressing gender issues more and in a better way? Why or why not? If not, what changes need to be made to increase and improve Attention to gender analysis?

3.2 Review performance and propose changes to the programme in order to improve this performance, on select aspects of process:

- *Coherence of design:* Is the design of the programme aligned with its objectives? If

needed, what changes could help improve this alignment?

- *Communications and outreach:* Are programme objectives (particularly long-term) and programme themes clearly stated and understood? Is the programme reaching its audience, especially in LAC? If needed, what changes could help improve the formulation and understanding of the programme's objectives, as well as its reach?
- *Selection process:* Is the selection process and criteria of high quality and defensible? Should there be more weight in some criteria than in others? Is the information found in the application form sufficient and relevant to the selection process? If needed, what could be done to improve the quality of the applications?
- *Results - Forms of collaboration:* What forms of collaboration have evolved out of the activities supported by the programme (networking, information sharing)? Which tend to work better than others and why? What changes, if any, could be brought to the programme to improve the effectiveness of these collaborations?
- *Results - Capture of additional funding:* Have some projects triggered larger endeavours supported by agencies such as IDRC, CIDA, Canadian Research Councils, foreign foundations and donor agencies? What has been critical to the success of these endeavours? What changes, if any, could be brought to the programme to improve the chances for such upscaling?

3.3 Assess whether the current programme is the best option for IDRC and AUCC:

- *For AUCC:* Is the programme managed in the most effective manner? What is the role of AUCC and should it be modified? Are there lessons or successes stemming from the LACREG programme that have informed other programmes managed by AUCC and vice-versa, so far? Is there room for improvement on this front?
- *For IDRC:* Through this programme, IDRC has sought to facilitate and broaden the field of academic exchanges and collaboration between Canadian and LAC academics, particularly in the general priority areas of the Centre, contributing to and strengthening mutually rewarding and respectful relationships between Canadian and LAC institutions, Is this the best modality to achieve this objective? Is it too dispersed an effort? What are opportunity costs and benefits of continuing to support to this type of wide-ranging programme, rather than a more focussed programmes? (These include some which are more focussed in terms of geography and/or substantive areas, or others which involve other stakeholders besides academics (a case in point is the Canada-Andean collaboration exploration currently underway)? Is it an "either-or", or is there room for two distinct, complementary approaches? Are there lessons or successes stemming from the LACREG programme that have informed other programmes managed by AUCC and vice-versa, so far? Is there room for improvement on this front? Is IDRC comfortable with the lower visibility afforded by the current management modality, relative to one which it would administer directly (Centre administered small grants are more labour intensive but afford a direct relationship with each partner institution)?

3.4 Evaluation Tools and Activities:

- *Review of existing documentation:* This includes examining the final reports submitted by grant recipients, technical reports, data regarding the country of origin of LACREG recipients, and other matters such as the ratio of male versus female grant recipients.
- *Questionnaires:* Questionnaires developed for LACREG stakeholders. This includes past Canadian and LAC grant recipients, ILOs, and LACREG selection committee members. The questionnaires can be found in Annexes 2, 3, 4 and 5.
- *Canadian field visits:* Two field visits were made to two Canadian locations to meet with LACREG stakeholders.
- *LAC field visits:* Three LAC countries were visited. Similarly, the objective was to meet with LAC stakeholders to gather their perspective.
- *Supplementary interviews:* The interviews were conducted in person, by telephone or via e-mail correspondents.

These tools and activities allowed for the identification and investigation of different scenarios pertaining to how LACREG is used as well as the impacts of the programme. In addition, the various tools and activities were employed in a manner that allowed the information gathered in each step to inform and direct subsequent steps. The process started with the review of existing documentation and was followed by the development and distribution of questionnaires. Finally, the Canadian and LAC field visits were completed. Hence starting with the questionnaires, each stage was shaped by the findings of the earlier stages.

The supplementary interviews were used throughout the evaluation process. It is important to note and as will be discussed later, practical considerations would also play an important role in terms of choosing the Canadian and LAC field visit locations.

4. 0 INITIAL DOCUMENT REVIEW

During the initial document review, the following key points were retained:

- A healthy percentage of grant recipients are women. The percentage of women receiving grants has been consistently increasing. However, the tracking and reporting of gender related impacts remains inconsistent. There is a lack of detail in the recipient's reports relating to the impact of the LACREG experience on gender issues.
- There is a trend of a diminishing number of grant recipients coming from LAC countries. Up until 2002, it appeared that there would be an increasing number of grant recipients coming from LAC countries. However at the time of the evaluation, the contrary is actually occurring during the 2000 to 2006 period. For the 2006 round of LACREG application, there were no successful LAC candidates. This discovery would change to some degree the focus of the evaluation in that understanding the falling LAC numbers became a greater priority.
- Although LACREG candidates are expected to be fluent in the language of the host country, the reports would indicate that this is not always the case. There was one case of a LACREG recipient using a translator and others reported that their Spanish, Portuguese or English improved during their LACREG experience. A number of grant recipients cited in their report the issue of language barrier. Complications relating to communications occur on many levels but a key one appears to be language.
- In terms of IDRC sector priorities, there appears to be a much larger concentration of grants in the field of the environment and natural resource management. How has this situation emerged? Is it worrisome or not? There are some interesting micro trends such as grants in the field of Fair Trade that may be worth highlighting and understanding better.
- Is there a need to understand and distinguish between graduate students and established faculty members in terms of the usefulness and the role that the LACREG grants? Who benefits more from the grants: the graduate student or the established faculty member? This issue will further be discussed in this report.
- Based on the number of successful grants, a number of countries were identified as possible case studies. Successful grants included both Canadians visiting LAC countries and LAC countries sending grant recipients to Canada. Two types of countries were identified. The first group related to large countries like Brazil, and Mexico that have a significant number of LACREG grant. The second category includes smaller countries like Costa Rica, Colombia, Argentina, and Cuba that consistently have grants recipients. These countries in relation to LACREG activity will be studied further to narrow down the choice for the country case studies.

5.0 QUESTIONNAIRES

In the fall of 2006, specific questionnaires for Canadian and LAC grant recipients, ILOs and selection committee members were developed and distributed. Beforehand, the questionnaires were circulated for comments and suggestions on how to improve them. IDRC, AUCC, ILOs, grant recipients as well as selection committee members provided comments on these draft questionnaires.

5.1 Response rate

Twenty six Canadian grant recipients filled out the questionnaire. Three LAC recipients responded to the questionnaire, 12 ILOs and 2 selection committee members completed their respective questionnaires. It should be noted that numerous follow ups were done in order to increase the response rate.

Response Rate by Type of Stakeholder groups

Stakeholder groups	Total number of potential respondents	Total number of questionnaires completed	Response rate
ILOs	38	11	29%
Canadian grant recipients	95	28	28.5%
LAC grant recipients	11	3	27%
Selection committee members	8	2	25%
TOTAL	152	41	27%

5.2 Canadian Grant Recipient

Although it appeared that some recipients put more thought into answering the questionnaire than others, some important trends and ideas were identified. We can divide the key comments of Canadian LACREG grant recipients into 3 broad categories; professional development, partnership building; and practical or administrative issues regarding the major benefits of LACREG. In addition, the issue of sustainability of results has been addressed separately.

Professional Development

- Nine of 28 respondents (34%) listed their professional growth as researchers and international specialists as a major benefit of LACREG.
- Nine out of 28 respondents (34%) also identified the opportunity to improve their language skills as a major benefit.
- Some of the respondents not listing professional development or language skill development as benefits appear to be more seasoned as international researchers and fluent in the host country language.

Partnership Building

- Twenty two out of 28 (84%) respondents claimed that they have maintained professional contact with their LAC counterparts after their LACREG experience. The contact is described as anything from simply continuing to exchanging e-mails to much higher levels of engagement like the signing of formal agreements like Memorandum of Understanding (MOU). There are instances of further staff and or student exchanges. Another example of further partnerships: two UPCD Tier 2 projects in Cuba were a direct result of a LACREG grant.
- In at least two cases, new partnership building was reported to be taking place after the LACREG grant activities. New LAC partners had emerged and maintained the relationship with the Canadian counterpart.
- In total, 11 of the 28 (42%) Canadian respondents reported that, as a result of LACREG, relations have been established with other LAC institutions other than the original one. Again, the level of partnership varies greatly from establishing e-mail contact to establishing a close working relationship in the host country with a third party.

Administrative Issues

- In terms of the least satisfying aspects of LACREG, the main concern with the majority of respondents is that the maximum grant amount is low (maximum LACREG contribution of \$6,500) and should be increased. With few exceptions, all Canadian respondents brought up the financial limitations of LACREG as an issue somewhere in their responses to the questionnaire. Other financial related concerns relate to the issue of finding the money to make the 1/3 in-kind contribution. Another concern cited is the difficulty of the LAC partners and their ability to provide the in-kind contribution.
- A small number of respondents also expressed concerns about the low success rate in applying and how this may be discouraging people. There are also concerns relating to the quantity of paperwork involved in applying for such a small grant. In addition, the lack of flexibility in terms of the once-a-year deadline and the need to make use of the grant within a year were also issues frequently mentioned.
- There were other specific concerns like the issue of LACREG money being awarded to the individual and not the institution and how this can cause tax troubles.
- However, the flexibility that LACREG offers in terms of level of academics and their disciplines is much appreciated.

The Issue of Sustainability

- Canadian respondents reported quite varied ways in which LACREG has contributed to the sustainability of their relationships with LAC partners. This is to be expected given that the circumstances in which the grants are used vary considerably. Ongoing correspondences with the occasional visit may be acceptable in one situation but not for stakeholders hoping for steady project funding. On the other hand, it is clear that for many LACREG, has been contributing to making relationships more sustainable even if the sum of money involved is small. It may be something as simple as permitting a face-to-face meeting that confirms the

directions the partnership is taking, thus allowing the Canadian and LAC partner to take their partnership to another level. As one respondent pointed out, keeping long distance partnerships going is very difficult and this is where a programme like LACREG can make a critical difference. LACREG appears to be creating the possibility for professional contact, something other grant programmes do not offer. This seems especially important for more junior researchers who are more limited in their options for securing funding.

- One of the areas where respondents felt that LACREG could make a greater contribution was by providing two-way grants that would create the opportunity for both partners to travel and work in each other's countries. This was the first sign of a misconception that was identified throughout the evaluation. Some respondents thought that LACREG is for the exclusive use of Canadian researchers. A few other individuals mistakenly expressed the idea that LACREG was only for established academics.
- One respondent included in his questionnaire comments about the stress and ultimately the failure in transforming the LACREG grant into a project with stable funding. This particular respondent took very seriously the responsibility to establish a long-term viable partnership through LACREG. The Canadian respondents understood that LACREG is a small amount of money and that expectations about what can be accomplished should be reasonable. There was support from two respondents for the idea of LACREG establishing some sort of a two-tiered system that would allow for a second round of funding, provided certain objectives are obtained during the first stage.
- Other ideas identified by Canadian questionnaire respondents that were reinforced in other stages of the evaluation. This includes the need for a more flexible application process, a two-tiered system with more financial support for a second stage and a desire to see LACREG financial support be more substantial.
- An interesting thing to note is that six Canadian respondents (26%) are of LAC origin. For example, one respondent who returned to her country of origin described how the LACREG grant acted as a catalyst in developing project activity. This is a trend that was further observed in other stages of the evaluation.

5.3 LAC Grant Recipients

It was not possible to contact many of the former LAC grant recipients as many e-mail addresses were no longer valid. Despite Internet searches and contact with LAC institutions, several former LAC grant recipients remained could not be contacted.

Some of the more interesting points put forward by the LAC respondents included the notion that LACREG was a wonderful experience in terms of professional development. All were very grateful to have the opportunity that LACREG presented.

In terms of changes to be made to LACREG, LAC grant recipients mentioned the possibility of considering more flexible timing for using the grant.

One respondent reiterated a point made by a Canadian recipient about possibly establishing a post experience forum for LACREG grant recipients to share their experience.

5.4 ILO Respondents

The completed ILO questionnaires demonstrate a range of opinions and understanding of what LACREG is about. Their comments can be summarized in the three points below. ILO's key recommendations follow these three points.

Level of Interest

- A majority of the ILOs answering the questionnaire consider LACREG a priority for their institutions and recognize its importance and are therefore grateful for LACREG.
- ILOs report that LACREG is being promoted in a variety of ways through e-mail distribution of programme information to various international list serves, web announcements, and in inclusion in an international funding database. One ILO reported that her department works with applicants in programme design and proposal writing for LACREG when support is requested.
- However, one ILO reported that it has been difficult for staff members to gain access to LACREG funds. Hence, the importance of LACREG for that institution has diminished.
- A few ILO respondents, perhaps new on the job, admit to knowing very little about LACREG.

Expected Outcomes

- The role of LACREG in building partnerships and in securing other forms of funding is clearly the priority for ILOs.
- One ILO recounted how LACREG had been instrumental in creating a very fruitful experience in Costa Rica that is to be replicated in two other countries. The experience of this particular institution was studied further at other stages of the evaluation.

Unrealistic Expectations

- LACREG is seen as a complimentary grant programme that can enhance or lead to other sources of funding.
- On the other hand, one ILO minimized the importance of LACREG as builder of sustainable relationships and as a source of funding.
- One might best summarize the opinion of ILOs on LACREG as creating both an opportunity and a challenge as how to expand a personnel relationship into an institutional one.

ILO's Key Recommendations

- Over 50% of the ILO would like to see the size of the grants increase.
- Points made in relation to the issue of the amount of the grant include that the grant process is too laborious for the applicant and the LAC partner for the amount of money awarded.

5.5 Selection Committee Members

The two questionnaires that were completed by the selection committee members are very insightful in that they highlight a more global perspective of what grant proposals should look like in terms of the potential to build partnerships and seek developmental impacts.

The results found in the questionnaires completed by the Canadian and LAC grant recipients are very different in that almost all grants end up contributing to professional development and building partnerships.

One of the interesting points raised by a selection committee respondent was that one of the reasons for the diminishing number of successful LAC grant applicants was that more junior researchers lack a strong institutional partner in Canada.

The other respondent speculated about inconsistencies between IDRC development priorities and the inability to address gender issues adequately in proposals. There is a feeling that some LAC applicants do not know how to address the issue of gender impacts or feel that their research is of a general benefit to all people without needing any specific reference to gender.

6.0 CASE STUDIES

As noted in the methodology section, the strategy was to have each stage inform the next one, ultimately identifying pertinent country case studies and specific cases studies that would facilitate the greatest understanding regarding the strengths and challenges related to LACREG.

6.1 Canadian Interviews and Case Studies

6.1.1 Rationale for Selection of Canadian Interviews and Case Studies

In the month of February 2007, two Canadian site visits were undertaken: one to Montreal and the other one to Toronto. The reason for this is that both cities provided the best opportunity to meet with individuals and institutions with various scenarios of participation in LACREG and links to the potential LAC case studies. The relationship between individuals and universities to be visited and the people to be interviewed and the LAC case study countries is one of bringing together diverse elements and establishing an analytical basis for evaluating LACREG via a number of perspectives. The expected outcomes included:

- Visiting universities and interviewing representatives of Canadian universities that have hosted LAC grant recipients.
- Visiting and interviewing representatives of Canadian universities that have been successful or unsuccessful in using LACREG to build partnerships in LAC.
- Visiting and interviewing LACREG grant recipients who have been able to put the LACREG grants to good use in terms of and establishing professional and institutional networks.
- Ascertaining the various institutional perspectives on LACREG.
- Visiting institutions or departments that have used LACREG to serve various institutional objectives such as solidifying the terrain for implementing a UPCD Tier 2 project. This might include also institutions that have used LACREG to support the ambitions of single or several departments. This could also include universities that have used LACREG to develop institutional relationships with a multitude of countries.

Guiding the selection of the Canadian universities and individuals to visit was the interrelation between the Canadian entities and LAC countries and partnering institutions.

6.1.2 Montreal (February 4 to 6, 2007)

All grant applicants interviewed in Montreal (see Annex 1) considered their LACREG experience to have been a very worthwhile from the standpoint of their professional development and building partnerships. For at least two Montreal-based grant recipients, it was also an opportunity to re-establish professional contacts with their country of origin. For a few others, it was a valuable opportunity to gain field experience and perfect a second or third language.

The degree to which a LACREG grant has contributed to establishing formal partnerships varied considerably. For one recipient and her department at the Université de Montréal, the grant led to the signing of a formal MOU between her institution and a Mexican counterpart. The following

year, the Mexican partner visited Montréal through another LACREG grant. The Canadian and Mexican institutions are still collaborating and looking for funding for a larger project. A young Université de Montréal researcher of Colombian origin accompanied the grant recipient to Mexico and will be associated with any future project activity and hopes to apply to LACREG soon.

Another young researcher from UQAM cannot imagine how she would have been able to travel to Brazil to complete field research if the relationship between UQAM and the Brazilian partners was not already strong. Her own self-admitted inexperience and lack of familiarity with Brazil would have made striking out on her own very difficult.

For another recipient at a Montreal university, the LACREG grant helped to complete research in Peru that today, is leading to further fieldwork and a number of publications. However, there is no formal partnership between institutions yet. This particular academic feels that her department is highly interested in working in LAC. The ILO of this same institution in the ILO questionnaire tended to downplay the institutional interest in both LAC and LACREG. This provides just one example of how there can be many different perspectives on LACREG within the same institution.

One grant recipient of Colombian origin and currently attached to the UQAM decided to use her LACREG grant money to cover the cost of her trip to Colombia and pay for the visit to Canada by her Colombian partner from the Universidad de Los Andes. In this particular case, no formal institutional partnership was ever established. However, the Canadian academic will be spending her sabbatical year in Colombia as a guest lecturer. Also, she is presently supervising the doctoral candidate from the Universidad de Los Andes who is studying in Montreal.

In another case, a LACREG grant appeared to have been the starting point for a very fruitful partnership between Université de Montréal and an Argentinean institute until political unrest and economic uncertainty undermined the local situation to the point that the project lost all momentum. The Canadian grant recipient, himself of Argentinean origin, explained how his LACREG experience in Argentina was conducted in a broader context of strong institutional support for an eventual health project. However, the political situation in Argentina took a turn for the worse and the proposed project remains in limbo. This is despite the fact that the original Argentinean partner since then became the Minister of Health in Argentina. The Canadian academic remains in contact with other partners in Argentina and hopes that some day the project can resume.

The perspective of the one ILO interviewed during the Montreal mission was in many ways a stark contrast to the grant recipients. Accompanied by an ILO from LAC and a grant recipient, the ILO expressed the need for more formally linking LACREG grants to other programmes or funding mechanisms, especially IDRC programmes. The worry is that too often the activities supported by LACREG are undertaken in a void with no connection to larger ambitions. There is also a strong desire to see LACREG provide larger sum of money to recipients as means to enhance the possibility that a LACREG grant would create a better basis for leading to a sustainable and long-term relationship.

One area where grant recipients and ILOs in Quebec can agree is that the binds between LAC countries and Quebec institutions are growing stronger and hence making LACREG increasingly more relevant even though CIDA is withdrawing from LAC.

6.1.3 Toronto (Toronto February 27-28)

In Toronto, there was a small but very critical number of interviews that greatly shaped the subsequent direction of the evaluation. The visit to Toronto continued the task of documenting the very different circumstances in which Canadian academics make use of LACREG, and how institutional and individual perspectives on LACREG can vary widely.

One grant recipient interviewed reported that her LACREG proposal was prepared by her Colombian counterparts at the Universidad Javeriana. The Canadian grant recipient was not even aware that LACREG existed before her Colombian partner convinced her to apply. This particular grant was used to finance two trips by the Canadian academic to Colombia and one visit to Canada by the Colombian partner. As a result, a partnership has been solidified and now has stronger institutional linkages. However, the proponents have thus far have not been able to secure secondary funding for a concrete project in the health sector.

One ILO interviewed during the Toronto mission had a very limited understanding of LACREG. The name of another individual overseeing international research was provided but a meeting at that time was not possible. The meeting with the ILO provided an opportunity to learn more about LACREG. At the same time, the ILO explained that LAC is a very important priority for his institution and that there are more and more exchanges and agreements are signed with LAC countries in a variety of fields. Like in Quebec, LAC institutions are seen as being natural partners for a Toronto-based institution due to their relatively close proximity, cultural similarities and highly capable professionals.

A meeting with a professor at York University – himself a former LACREG grant recipient – overseeing the fieldwork of a number of LACREG grant recipients afforded an opportunity to examine a unique LACREG situation. A single development project in Costa Rica has hosted numerous LACREG grant recipients from York University. In his view, the experience of the grant recipients has been by and large, very positive. Not only have the recipients been able to contribute to a larger conservation project, but they have also had their academic experience enhanced as well as furthered their own professional development by having their research published. Many have moved onto other initiatives in LAC. This particular project took the unusual but progressive step of ensuring that the LACREG grants received Spanish language training courses paid for by the project. The York-Costa Rica experience was identified as a viable case study.

Perhaps the most important message coming from Toronto was best summed up by the former director of the Centre for Research on Latin America and the Caribbean (CERLAC). CERLAC is a leading centre in Canada on Latin America. In the past, several academics associated with CERLAC have been LACREG recipients. According to the former director, LACREG should be first and foremost about providing an opportunity for Canadian academics and their LAC counterparts to do field research. In other words, LACREG should be seen as an opportunity to develop grant recipients professionally rather than building institutional relationships. This opinion was shared by others in Toronto.

6.1.4 Overview of Findings from Canadian Interviews and Case Studies

Perceptions of LACREG

- There is almost unanimous support for LACREG. Grant recipients are by and large

extremely content with their LACREG experience. Most if not all report that LACREG has contributed to their professional development.

- What was also apparent is that there is strong interest in LACREG within Canadian academics of LAC origin or a strong family or personnel connection with Hispanic culture. Discussions with university officials about the current and prospective presence of LAC academics in Canadian universities, indicates that one can expect this trend to intensify.
- Despite whatever criticism there might be about LACREG such as its financial limitations, there is agreement that it fills an important role which is not met by any other programme with regards to building relationships between Canadian and LAC academics and institutions.
- Beyond the basic belief that LACREG is important, opinion is highly divided on how to improve LACREG. Many appreciate the openness of LACREG while others, especially some ILOs, would like to see LACREG altered significantly to better serve institutional goals (i.e. lead to project funding).
- Few Canadian grant recipients were aware that their LAC counterparts could apply for LACREG. It does appear that this misconception has more to do with people not carefully reading the application guidelines.

Partnership Building

- There is little doubt that LACREG is contributing to building partnerships. However, there is divergence of opinion between grant recipients and ILOs in terms of the extent to which LACREG does – and should – contribute to building partnerships. The questionnaires and interviews with Canadian grant recipients present a unique perspective: the grants' key impact is in the area of professional development, but at the same time LACREG is contributing in varying degrees to building partnerships.
- Several ILOs thought that LACREG should be doing more to build partnerships. Other representatives of Canadian institutions, e.g. faculty members, do not necessarily share this opinion. There is support for the idea that the primary function of LACREG should be to develop capable Canadian and LAC researchers.
- On that note, one should be aware of the fact that opinions diverge when it comes to what constitutes partnership building. For some, it is as simple as establishing e-mail contact or having face-to-face contact. For others, it is a full-blown project. LACREG is contributing to building partnerships on these different levels.

Improving LACREG

- There is agreement that the amount of money provided by LACREG should increase. It is felt that for such a small amount of money, too much is expected in terms of reporting requirements. At the same time, the grants are too small to expect anything but the most modest of objectives in terms of developmental impacts or building sustainable partnerships. There are concerns regarding the application forms relating to such matters as the financial component.

- On a few occasions, several respondents mentioned that a second grant could go a long way to firm up a burgeoning partnership.
- Also cited as a concern is the gender impact selection criterion. Applicants tend to not fully understand how to address the gender issue when working in an area where they assume there is no profound gender consideration with their research.
- A number of individuals expressed support for the idea that LACREG be more flexible in terms of the restrictions of when a LACREG grant can be used. For example, it was suggested that a 2007 grant recipient should be valid for two years as opposed to one.
- A similar point was raised regarding the timing of the selection process. Some respondents mentioned that a grant selection process conducted every 6 months would be better than just once a year.
- The possibility of creating a mechanism for LACREG grant recipients to communicate with each other during and after the LACREG experience was also mentioned.

6.2 LAC Case Studies

6.2.1 Rationale for Selection of LAC Case Studies

Once the analysis of the initial document review, content of questionnaires and Canadian interviews was completed, five countries were identified as potential LAC case studies. This included Colombia, Mexico, Cuba, Brazil, and Costa Rica. All five countries provided a variety of scenarios for studying how LACREG is used.

With both Mexico and Brazil, there were considerable concerns regarding logistical matters. In Brazil, it was highly improbable that given the distance between potential interviewees and the limited time available, a meaningful evaluation could be conducted. In terms of Mexico, very few people were able to meet with the evaluation team during the designated time frame and there was also the issue of travel time between interviews. The other three countries presented better logistical possibilities including a greater number of people stating a willingness to meet with the evaluation team.

Of equal importance was the fact that Cuba, Costa Rica and Colombia also presented a variety of scenarios of equal interest as anything that could be found in Brazil or Mexico in terms of how LACREG has been used in these countries and its impact. All three countries have special characteristics with regards to demonstrating unique situations and outcomes of LACREG.

In Cuba, there was an opportunity to trace the long-term impact of one grant that has linked Atlantic Canada with a Cuban university. From this success story and others, Cuba was also identified as a country where some of the more problematic aspects of LACREG could be examined.

Costa Rica offered the opportunity to examine the links between one large project and the work of a series of LACREG grant recipients. Costa Rica also presented the possibility to meet with leading regional educational institutions that could assist in understanding how LACREG could be better promoted in Latin LAC.

Colombia provided the possibility to meet with Colombians and Colombian institutions that had often been very innovative in their use of LACREG. Colombia is very much about diverse LACREG scenarios that help to better understand the reach and importance of LACREG.

Eventually, the three case study countries were narrowed down to Cuba, Costa Rica and Colombia.

Prior to visiting the three countries, all Canadian counterparts tied to the project were interviewed either in person or by phone.

6.2.2 Cuba (April 10-15, 2007)

The scenarios to be examined in Cuba included:

- The role of a Canadian LACREG recipient from the University of New Brunswick in establishing a multitude of partnerships and projects between a Cuban university outside of Havana and partners in New Brunswick and elsewhere in Atlantic Canada. This partnership was chosen as a special case study.
- The role of a Canadian LACREG recipient in using her LACREG experience to contribute to the development of a UPCD Tier 2 project in collaboration with a Havana-based university.
- The ongoing collaboration between a Havana-based institution and an Ontario-based university that began with a LACREG grant but has yet to result in a definitive project with a strong funding base.
- The ongoing collaboration between a Havana-based institution and a New Brunswick based university that starts with a LACREG grant but has yet to result in a definitive project with a strong funding base.
- The abrupt termination of partnership between a Canadian LACREG grant recipient and the Cuban partner.

General Discussion Regarding Cuba

There has a long and steady history both in terms of sending Canadians to Cuba and Cubans coming to Canada on LACREG grants. There has been considerable interest all across Canada from academic institutions in establishing relationships with Cuba through LACREG. Cuba as a case study country is ideally suited as it presents a variety of scenarios in terms of LACREG playing a role in building sustainable partnerships.

The Marine Research Centre at the University of Havana has established and nurtured a relationship with the University of New Brunswick through an initial LACREG grant. There has never been an overriding project. However, the LACREG grant was combined with other small sources of funding to maintain professional relationship with the university in New Brunswick. The stakeholders submitted a proposal for a UPCD Tier 2 project but were turned down.

The Centro de Estudios Demográficos of Havana finds itself in a similar situation with an Ontario-based university. Like in the previous case, it has been a struggle to maintain a professional relationship without an actual project. Exchanges of professors and students have taken place in the aftermath of the LACREG experience. However, the contact with Canada is very ad hoc. A number of proposals for steady project funding from both Canadian and European development agencies have proven unsuccessful. The ability to turn the LACREG

grant into a project is important as donor funding is very limited.

One Canadian LACREG recipient's experience in Cuba was very positive. This person invested time in learning Spanish spending a number of months in Cuba leading up to engaging in the activities outlined in the LACREG proposal. The positive nature of the experience relates to having the opportunity to perfect Spanish and work overseas. The development of Spanish language skills has served the LACREG grant recipient very well in her post LACREG endeavours as she has used the new skill in other professional capacities upon returning to Canada. However, the institutional/professional relationship with the Cuban partner ended shortly thereafter amidst some misunderstanding. There are ongoing concerns regarding how the LACREG recipient's work was or was not shared with her Cuban partners.

At the Instituto Superior Politécnico José Antonio Echeverría, a Canadian professor visiting on a LACREG grant was able to work with one of the leading Cuban technical university and the recently formed Cuban Cleaner Production Centre (CUJAE) to gather information to develop a training programme on cleaner production and other environmental topics. The course material now forms the basis of an ongoing UPCD Tier 2 project between CUJAE and the University of Guelph. Although this UPCD Tier 2 project has encountered some serious difficulties, the training programme identified during the LACREG financed stay in Cuba is ongoing and remains the anchor of the project.

What comes through in all these partnerships is the critical importance that Cuban universities place on their relationships with Canadian institutions. Regardless of what frustration there may be in Cuba in not being able to use LACREG as a springboard to finding more funding, the partnership with a Canadian institution is highly cherished.

Cuban Case Study: University of New Brunswick and the Universidad Cienfuegos de Cuba

One initial LACREG grant solidified a relationship between the University of New Brunswick and the Universidad de Cienfuegos that has numerous positive outcomes that go well beyond the original partnership between the Cuban and Canadian institution. There is now a pan-Atlantic Canadian connection with the Universidad de Cienfuegos. The Universidad de Cienfuegos is by no means Cuba's largest university. It nevertheless has a strong reputation in Cuba and outside as each year the school hosts a large number of international students.

There have been community-level linkages outside of academic circles that were deemed to be very important for the Cuban communities in that they were established during what is considered by Cubans to be one of the worst periods for the country in recent history. There has also been a countless number of academic exchanges, donations of computers, automobiles and other materials. A guesthouse was established to lodge the flow of Canadians to Cienfuegos. The partnership has allowed the University of Cienfuegos to develop into new areas of academic interest of importance to Cuba.

Although this initial grant has never led to a UPCD Tier 2 project with the original partners, the broader relationship between Cuba and Atlantic Canada has spawned two UPCD Tier 2 projects. One is between the Universidad de Cienfuegos and a Nova Scotia-based institution. The second UPCD Tier 2 involves the University of New Brunswick and CUJAE mentioned in the previous section.

The Cuban partners both at Cienfuegos and CUJAE agree that much of what has occurred can be attributed to the drive and initiative of the original Canadian grant recipient. Like with the

other Cuban LACREG partners, these stakeholders highly value their relationship with Canada. According to the ILO of the University of Cienfuegos, the university's relationship with Canada is considered the most important for reasons of compatibility, common respect and the utility of partnering with Canadian entities.

6.2.3 Costa Rica (April 15-18, 2007)

The scenarios to be examined in Costa Rica included:

- The facilitation of the field research of a large number of Canadian LACREG grant recipients at York University through the framework of one project. This is the case study emanating from Costa Rica.
- The role of a LACREG grant recipient's experience in creating a broader opportunity for other British Columbian-based students and academics to participate in a community based sustainable tourism project.
- Discussions with two leading regional academic institutions regarding how to better promote LACREG in LAC.

General Discussion Regarding Costa Rica

Costa Rica has committed a great deal of the country's efforts into establishing a sustainable tourism sector. The most important aspect of tourism in Costa Rica evolves around the environment. Hence, the protection of forests, reserve area areas, beachfronts and maintaining general standards linked to cleanliness and orderliness are highly important. Not surprisingly, LACREG grants linked to Costa Rica have been largely focussed on the environment and tourism. As best as can be determined, 14 of the 18 LACREG grants that were awarded for research in Costa Rica were focussed on environmental issues.

One British Colombian-based LACREG grant recipient was able to use his LACREG experience to a strengthen a relationship with a Costa Rican activist/farmer to establish a sustainable tourism project at the village level. The idea is to demonstrate how tourism in Costa Rica can be financially advantageous for a village without forcing people into dealing with unwanted dilemmas regarding use of community resources. Although tourism is very important to Costa Rica, it is not always sustainable and can often attract unwanted aspects like prostitution and increased drug trafficking. The Costa Rican partner visited the Canadian institution and made presentations to faculty, students and the larger community on Fair Trade and organic farming, themes the project is exploring. A group of Canadian students will visit Costa Rica shortly. This will be the second such visit meant to provide knowledge transfer and allow the students the opportunity to live in a Costa Rican community for three to five months while working on the sustainable tourism project.

Another Canadian grant recipient contacted during the evaluation performed research in Costa Rica on sustainable coffee production. Unfortunately, her Costa Rican contact was unavailable during the evaluation period.

Two institutions were visited during the mission to Costa Rica; Universidad EARTH (<http://www.earth.ac.cr/>) and Centro Agronómico Tropical de Investigación y Enseñanza CATIE (<http://www.catie.ac.cr>) to introduce LACREG to officials at the two institutions and to understand how LACREG can be better promoted. EARTH, a major regional and world leader in undergraduate academic education is also a leading environmental training and research institution. EARTH has a large international staff. In discussions with EARTH, it became very apparent that there are many institutions in LAC that would be interested in seeing their staff

make use of a programme like LACREG. CATIE would appear to be a better suited to LACREG in that it has a variety of graduate programmes.

Costa Rica Case Study: York University and Coope AGRI and Centro Científico Tropical

York University established a working relationship with two Costa Rican institutions in support of yielding data on the benefits of shade-grown coffee to the environment, to local farm communities, and to business, leading to a growing public awareness and taste for the product. The long-term plan is to protect a rainforest as part of the largest, undisturbed rainforest in Central America, and to create a biological corridor to the Los Cusingos neo-tropical bird sanctuary downstream. The project site is the Las Nubes, a mid-elevation cloud forest adjacent to Chirripó National Park and the Amistad Biosphere Reserve. The rainforest is managed by the Centro Científico Tropical. Coope AGRI and York University are working together to establish marketing opportunities for the coffee and related products.

The work of York University is financed in part by a trust fund that was established by a Torontonian who was critical in protecting and establishing the rainforest in the early years. A number of York University students have travelled to the site, some through the LACREG program. To date, 10 LACREG grant recipients have worked on the project.

In most cases, the LACREG grant recipients have been young academics who completed important research work that benefited several aspects of the project while providing them with the material to produce publications and help in the establishment of academic and professional careers. The setting of an organic coffee growing activity in a rainforest along a river has proven to be the perfect setting for providing environmental students multiple opportunities to conduct research while contributing to the larger process of protecting the water source. To ensure that the LACREG grant recipients functioned effectively in Costa Rica, York University covered the cost of Spanish language training in Costa Rica

One of the students going to Costa Rica on a LACREG grant was a Colombian who also used the grant to visit Colombia on research related to her work on organic coffee growing. She is now working for a leading Canadian NGO on international projects directly related to her LACREG experience. This same grant recipient travelled in Canada with the project's contact at Coope AGRI learning about the fair trade coffee industry in Canada.

Although the experience of the Canadian LACREG grant recipients associated with this project has been highly positive, it has not been without its problems. There has been a logistical strain on at least one of the Costa Rican partners. However, how much of this is attributable to the LACREG recipients per se is debatable as other York University students in the Faculty of Environmental Studies are also visiting the Las Nubes site on a fairly regular basis.

6.2.4 Colombia (April 18 -24)

The scenarios to be examined in Colombia included:

- A Colombian LACREG grant recipient who is a researcher for a leading Colombian NGO who visited Canada.
- Discussions with ILOs from both private and public universities to understand how to better promote LACREG in Colombia.
- Discussion with an ILO for the department of public health of a public university.
- Meeting with the training and work placement officer of a leading Colombian and

international tropical agricultural institution that hosted a LACREG recipient. This person was unable to maintain the relationship with the Canadian partner but is interested in hosting future recipients.

- The experience of a British Columbia-based grant recipient working in the field of malaria and dengue fever research and his ongoing collaboration with a Colombian partner a researcher at a leading research centre who he met through his LACREG experience.
- The experience of a British Columbia-based grant recipient working in the field of water resource management and her work with new Colombian partners after the initial LACREG partner could no longer sustain the relationship.
- Colombian based water resource management institution interested in using LACREG to build partnerships with Canadian institutions.
- A relationship that has developed between a Colombian training hospital and a leading Ontario hospital as a result of a Colombian LACREG grant experience in Canada.
- A Colombian woman who was a student at an Ontario university applied for a LACREG grant and spent 5 months conducting research for her thesis in Ecuador.
- A Colombian women who, while doing her doctoral at a Quebec university, returned to Colombia to conduct fieldwork as part of her doctoral requirements.
- To examine the experience of a Colombian team of academics who wrote the proposal for the eventually successful LACREG grant that was submitted in the name of a Canadian academic. A Colombian and the Canadian academic shared the LACREG grant.
- The experience of a Canadian academic of Colombian origin and her Colombian-based partner who shared a LACREG grant to facilitate travel to both countries and have maintained a professional relationship in the absence of an overriding project.

General Discussion Regarding Colombia

Colombia has slowly emerged as an important LACREG country. While the percentage of LACREG grants going to LAC countries has been diminishing, Colombia actually was increasing the number of LACREG grant recipients (with the exception of 2006). Colombia is also notable for the variation in scenarios of how LACREG is used to reinforce partnerships. The city of Cali is of particular interest and was designated as the third case study. Similar to Cuba and Costa Rica, there was unanimous interest in seeing more relationships with Canada. There is deep respect for Canada and more specifically Canadian academic institutions.

A Bogotá-based medical student applied for a LACREG grant, received funding and travelled to Canada. Upon completing her LACREG experience, she decided to immigrate to Canada and eventually received her landed immigrant status. She, along with another Canadian of Colombian origin also working in the medical profession, began working to strengthen the links between Colombia and Canada in the medical field. This actually led to one Colombian medical student conducting her residency in Toronto. She was highly grateful for her experience in Canada and the specialized training she received in the field of cancer research. Canadian medical students have also travelled to Bogotá for short-term work terms in a leading Colombian teaching hospital. In total three visits have been made to Colombia and three to Canada. Today, an informal network of Canadian and Colombian doctors and medical researchers exists as a direct result of LACREG. However, this group is desperately seeking funding that would allow for a better form of professional exchanges and joint project activity.

The Colombian mentioned earlier who was studying at York University used LACREG to go to Ecuador to conduct research on environmental conflict resolution. She is now back in Colombia working for a leading NGO addressing the issue of environmental conflict

resolution in coastal areas. The LACREG experience was critical to her professional development but did not necessarily result in any long-term partnership.

Similarly, another Colombian academic studied at Université Laval and returned to Colombia on a LACREG grant to conduct research on the displacement of Afro-Colombians. This person just published a major book on this topic and credits the LACREG grant for its critical importance in her research and the completion of her book. Now back in Colombia, the LACREG grant recipient is playing a leading role in efforts to examine displaced Afro-Colombian population.

As mentioned in the section on the Montreal interviews, UQAM and the Universidad de Los Andes share an ongoing interest in developing stronger relationships after a member of the engineering department shared a grant with a UQAM staff member of Colombian origin. There continues to be exchanges between the two institutions and, as noted earlier, a Colombian is presently in Montreal doing her work on her doctoral degree. This particular academic programme at the Universidad de Los Andes in the software development field at Los Andes requires that all PHD candidates spend a year overseas. However, with LACREG grant and other exchange programmes, Colombians routinely run into visa problems especially when there is a short turn around time from finding out when a grant has been approved and the start up date. Receiving quick Visa approval is nearly impossible. A point raised by the team at Los Andes was whether or not LACREG could be combined with other funding to allow longer stays in a host country. As mentioned, at the Universidad de Los Andes, a doctoral student must spend a year outside the country taking courses. Apparently most students can find funding for 6 months but not a year. Hence, LACREG is viewed as a perfect match.

Bogotá institutions are very eager to build stronger relations with Canada. Professional relations with Canada are considered of being great importance. One academic noted that Canadian and Canadian institutions tend to undervalue their potential contribution. "Canada opens up a new world that is neither European nor American".

Colombia Case Study: The Institutions of Cali

Colombia offers the broadest range of uses and outcomes of LACREG that one could imagine and no place symbolizes this better than the city of Cali, with a population of about two million people is blessed with four major universities and a number of leading research centres and NGOs. In fact, Colombian interest in LACREG finds much of its strength in Cali where for a number of reasons the city has become a relative hotbed of LACREG activity with three grants to facilitate travel and research in Canada and three grants to facilitate research work in and around Cali.

When the concentration of LACREG interest in Cali was first identified, there was a presumption that somehow an informal information network had been established in Cali that was feeding interest in that city. However, there has not turned out to be the case. The Cali-based grant recipients do not know each other and learned about LACREG through different means, including the Internet and word of mouth. The more obvious explanations include the interest in building relations with Canada and the fact that academics and researchers in Cali are highly motivated and professional. Although relations between Canada and institutions in Cali are relatively strong, it become apparent that many avenues for promoting LACREG in Cali have not been tapped into.

What has been repeated throughout this report is what makes Colombia and in particular Cali interesting is the nature of the LACREG experience. There is the Cali-based LACREG recipient

who while working for a Colombian NGO learned about LACREG on the Internet ICETEX (www.icetex.gov.co) (Instituto Colombiano de Crédito educativo y estudios técnicos en el exterior) and made contacts in Canada and was eventually awarded a LACREG grant. The experience was very productive but did not result in any longer term project activity.

Two Canadian grant recipients both at different British Columbian-based universities used LACREG to visit and work with their respective partners in Cali. Eventually though, for different reasons, neither grant recipient was able to sustain these partnerships. However, both recipients were able to identify other institutions in Cali where the potential was much greater for maintaining longer term professional relationships. To this date, these relationships continue. In both cases, the new partners were very optimistic as are the Canadian counterparts that relations will continue.

Meetings were held with the ILOs of Cali-based universities. One private university, Pontificia Universidad Javeriana de Cali is in the process of establishing a Canadian studies programme. This university has ties with a number of Canadian provinces. According to the ILO, Canada has a strong reputation in Colombia in the academic and research fields. Meetings were also held with ILOs of public universities that tend to be more under funded. All ILOs were very motivated in seeing their institutions develop closer links with Canada whether through LACREG or any other mechanism. None of the ILOs had ever heard of LACREG before. The ILOs from the public schools are perhaps more eager to see their graduate students and academics having access to such a Canadian grant programme and building links with Canada.

The Centro Internacional de Agricultura Tropical (CIAT) was one of the institutions that originally hosted a Canadian grant recipient but was forced to close down the department that oversaw her stay in Cali. This institution remains open to considering other opportunities for future LACREG collaboration even if the first experience was less than ideal. It is a major centre that like EARTH and CATIE in Costa Rica attracts researchers and development specialists from around the world.

Throughout the evaluator's visit to Cali, he was constantly being asked to meet with academics and representatives of various research centres to explain the objectives and guidelines for qualifying for LACREG. This is very indicative of the potential popularity of LACREG if its promotion is increased. All the ILOs visited during the time in Cali will see to it that LACREG is promoted throughout their institutions.

7.0 SUMMARY OF KEY FINDINGS FROM ALL TOOLS AND ACTIVITIES

7.1 Aspects of Substance: Summary of Key Findings

Understanding the relationship with broader context and other programmes

- LACREG is filling an important role in terms of plugging funding gaps by facilitating the commencement of relationships and maintaining ongoing relationships and contributing to research when no other financing can be found. For countries like Cuba and Colombia where donor support is limited, having access to LACREG is critical and highly appreciated.
- Tying the grant to IDRC's developmental objectives is encouraging research in a wide variety of development fields conducted by an interesting mixture of Canadian and LAC researchers and academics.
- An important element of the context in which the LACREG program evolved is the rising numbers of LAC academics in Canadian universities, on one hand, and the declining public development aid to the region, on the other. Both contribute to heighten the value of the LACREG programme to further bilateral understanding and collaboration. Moreover, this trend will help to entrench a dynamic that will assist in maintaining and possibly intensifying interest in LAC and by extension, LACREG.
- LACREG is a highly regarded grant programme that supports research on critical matters in a region of the world where CIDA support has been diminishing greatly in recent years. LACREG is a unique tool. It is the only flexible short-term two-way mobility grant programme for graduate students and researchers wishing to go to LAC. In addition, LAC is a part of the world that has a deep-seated respect for Canada and what Canadian academics and research institutions have to offer.
- Given the lack of federal strategy and financial support for overall student and faculty mobility, the LACREG programme is a great example of what can be done when small grants are available. As Canada's policies toward the Americas evolve, LACREG both opens doors to stronger relationships with LAC universities and public diplomacy.
- Many Canadian institutions are actively engaged in promoting greater links with LAC even if this is not necessarily in step with the current policies of the Canadian government. This is especially true in Quebec. It appears that many other institutions would be more interested in building relations with LAC if they had more success with programmes like LACREG and there were more opportunities to undertake projects in LAC.
- In countries such as Cuba and Colombia where political factors and other circumstances make it difficult to establish external relationships, LACREG's importance is undisputable. It is a lifeline that allows academics and researchers in such countries to retain faith in a future where other more concrete possibilities for funding and meaningful partnerships may exist.
- The Canada-Latin America-Caribbean Award administered by the International Council for Canadian Studies, supports scholars in universities or research institutes in the Latin America-Caribbean Region to undertake short term research, including collaborative research, contributing to the understanding of bilateral and multilateral relations between

Canada and LAC countries. During the LACREG evaluation, the Canada-Latin America-Caribbean Award was never mentioned by either Canadian or LAC partners or grant recipients as a complimentary funding option. It does appear that the award is worthy of promotion – perhaps through an enhanced LACREG Web site, as per evaluator’s recommendation – as potential complimentary funding to LACREG or in some cases, a better financial and academic option for LAC academics and researchers than LACREG. The Canada-Latin America-Caribbean Award with its focus on Canadian foreign policy democracy and rule of law; economic development and prosperity; environment; managing diversity; North American partnership; peace and security; interdisciplinary, multidisciplinary studies or comparative studies with substantial Canadian content (33% or more), covers some of the general priorities of LACREG. Hence one would anticipate that for certain LAC-based LACREG recipients, the Canada-Latin America-Caribbean Award would hold some promise as an additional funding source. Once again, it may be that the Canada-Latin America-Caribbean Award may better respond to the aspirations of potential LAC candidates than LACREG. It would also be interesting to see how the Canada-Latin America-Caribbean Award and the network that has been created to promote it in LAC could be used to promote LACREG. Of special interest would be the centers of Canadian studies found in countries like Brazil, Venezuela, Mexico and Argentina and other Canadian studies centers that may soon be created in places like Cali, Colombia.

- LACREG is responding well to and complements a wide range of IDRC’s priorities. Keeping LACREG open-ended will allow academics and institutions to make connections to IDRC priorities, university community priorities with regards to research for development, as well as regional and global context.
- The major challenge for researchers in terms of the evolution of the overall relations between Canada and LAC is ensuring that Canada understands the changing nature of LAC. Some countries like Chile are to be considered a developed country rather than a developing one. The same can be said for certain universities in Colombia and Brazil. At the same time, there are countries like Cuba that struggle and are still in a developing state. LAC presents opportunities for Canadian academic to establish relationships like one might do with a European institution. At the same time, there are opportunities to work with highly talented academics in poorer LAC that may require more intense Canadian support.
- The issue of the complimentary nature of LACREG is dealt with extensively in this report. LACREG basically compliments most IDRC and CIDA programmes. It is not however, a guarantee to further funding. LACREG’s strength is its autonomy and ability to act as a stepping stone or enhancement to other programmes. No fundamental change is required except to consider that more funding and flexibility may greatly enhance LACREG.

Nurturing Sustainable Collaborations

- There can be no doubt about the importance of LACREG both for Canadian and LAC stakeholders. The programme is playing an important role in developing Canadian and LAC academics and building partnerships. LACREG does not always lead to formal projects or long-term partnerships but in most cases, professional contact is maintained and sustained after the LACREG experience.
- From a Canadian perspective, a department or individual professors may have a strong interest in LAC even if their institution does not have. In academic institutions where there is

no official stated interest in LAC or LACREG, academics can be found that speak highly of their LACREG experience and their ongoing professional relationships in LAC. This is by no means a worrisome situation. It speaks more about the size of Canadian academic institutions and the dynamics related to international activity.

- LACREG clearly has a capacity to have a tremendous impact. However, given the small amount of money allocated to each grant recipient, one has to wonder about how much one can expect with regards to building partnerships.

Meeting Recipients' Objectives

- A key and somewhat unexpected benefit LACREG is professional development. Professional development is an important contribution towards institutional partnership strengthening even if it is not the goal of LACREG per se.
- The open ended nature of LACREG supports a wide variety of grant recipients to pursue an equally broad range of interests is highly appreciated by grant recipients. However, certain grant recipients would like to see LACREG more pro-actively serving as a platform for project funding. Certain stakeholders feel that tying LACREG to other IDRC and CIDA funding mechanism would enhance the utility of the grant. However, this is far from a commonly shared view.
- For the amount of money involved in this program, many Canadians and their LAC counterparts feel that too much is expected in terms of building long-term partnerships.

Cultivating Mutual Respect

- One of the most important conclusions from this evaluation is that there is an immense amount of mutual respect between Canadian and LAC academics. Canadians see their LAC counterparts as their equals and understand that it is often a question of having better access to ideas, technologies and other resources that enables them to stay ahead of their LAC counterparts on the curves of learning and experience.

7.2 Aspects of Process: Summary of Key Findings

Coherence of Design

- There is a desire to see LACREG change, especially with regards to the maximum grant size. Such an increase would allow people to stay longer in the host country.
- There is some desire to see LACREG linked to larger funding sources. However at the same time, there is support and clear evidence of the benefits of LACREG supporting standard field research.
- There is interest in seeing some form of a two tier LACREG system that would link an initial LACREG grant to a larger source of funding.
- Other changes relate to wanting to see LACREG become a bit more flexible in terms of the conditions under which the grant can be used. In countries like Colombia, where visas to

Canada are hard to obtain, greater latitude for start and end dates is critical.

Communications and Outreach

- People learn about LACREG through a variety of methods ranging from word of mouth to Internet searches. The only way to ensure that LACREG has greater exposure is to actively promote it. There is a lot of room even in countries that are relatively well aware of LACREG to promote it more thoroughly. For example, one might want to leverage relationships with Canadian Studies Centres, other non research networks or institutions and possibly NGO networks.
- There is no easy explanation as to why there are more grant recipients in the area of natural resource management and environment field than in relation to other IDRC priorities. It boils down to word of mouth and networking patterns that have no overriding guidance.
- There was a surprising lack of awareness amongst ILOs, Canadian grant recipients, LAC grant recipients that LAC-based academics can directly apply for a LACREG grant. Often individuals would complain about how LACREG was a one way. These persons were surprised to learn that LACREG is open to LAC researchers.

Selection Process

- Many are asking for changes in the application process that is deemed to be excessive given the small amount of money involved.
- In addition, the reporting requirements are seen as excessive given the amount of money involved.
- There is no practical reason to explain the relative domination of successful environmental or natural resource management related LACREG grants. However, part of the explanation related to the importance of environment both as a stand alone and cross-cutting issue.
- How selection committee members have rightfully evaluated the merits of a proposal does not necessarily correspond to how the grant recipient views his or her LACREG experience. Where the selection committee members are concerned about building partnership and developmental impacts, applicants also have in minds research related issues and professional development objectives.

Forms of Collaboration and Capturing Additional Funding

The following chart is a summary of types of partnerships identified through the questionnaires, interviews and case studies in Canada and LAC. The most important comment to be made about this table would be that as the grants are used in such a variety of ways and circumstances, it is not surprising to see that there is also an equally vast partnership scenario.

Types of Partnerships Identified Through Evaluation

Types of Partnerships	Occurrence	Rate
Maintaining ongoing relationship through correspondence with exchanges or continued field research, but no other significant financial support	13	36%
Formal MOU signed with possibility of ongoing academic exchange (sometimes through a formalized on going mechanism), but no other significant financial support	5	14%
Maintaining ongoing correspondence while still actively pursuing other funding opportunities	4	11%
Led to other joint activity (e.g. ongoing field research or academic exchange) without a significant source of funding	3	8%
Maintaining ongoing correspondences through informal means such as electronic mail, without perspective of substantial funding or project activity	3	8%
Contact is not maintained but the Canadian partner has found a new counterpart in the host LAC country	3	8%
Led to formal project activity with significant funding and a broaden range of exchanges and collaboration between Canada and the LAC partners	2	6%
Additional grant money was secured to maintain and strengthen the partnership, therefore allowing ongoing research	1	3%
Led to formal project activity with significant funding	1	3%
Contact is not being maintain	1	3%

It is interesting to note that more than two thirds of the partners maintained their partnerships in a way that goes beyond telecommunications after the initial LACREG visits. Within a year so, most of the partnerships would show that something positive was developed after the LACREG grant. One can see that long after a LACREG exchange, partners continue to maintain contact even if no project funding is in sight. It becomes clear that despite the limited funding opportunities, there is a strong belief in the original issue that brought the stakeholders together.

Gender Analysis

- The number of women applying for and obtaining LACREG grants is increasing. Female LACREG grant recipients were actively involved in shaping the findings of the evaluation. It is in the interest of all that this trend of growing female involvement in LACREG and academic collaboration between Canada and LAC be maintained. This is probably the best way to increase and improve the gender component of LACREG research activity.
- One practical consideration that was raised by LACREG female recipients was the need for more flexible start and end dates. Increased flexibility in that regards would be attractive for people with familial commitments (e.g. female researchers with small children).
- What is not clear is how beneficial and or effective the gender equality requirements as prescribed in the application form are. Researchers working on issues such as scientific investigations in a laboratory or conducting wildlife inventory feel that their work is gender

neutral. In these cases, applicants are complaining that the application process does not work in their favour because their scores are lower compared to other proposals that have a more active gender component.

- There was one suggestion that in the selection criteria, the gender section should be integrated into a broader category of equity and development.

7.3 IDRC and AUCC

From AUCC's perspective, LACREG is managed effectively. However, as demonstrated by this evaluation, there can be some administrative challenges related to the burdensome application and reporting processes.

Through this programme, IDRC has sought to facilitate and broaden the field of academic exchanges and collaboration between Canadian and LAC academics, particularly in the general priority areas of the Centre, contributing to and strengthening mutually rewarding and respectful relationships between Canadian and LAC institutions. LACREG may not be the perfect modality to achieve this objective but it certainly is an effective one. It is hard to imagine another grant programme that provided grants similar in size and having a great impact as LACREG in terms of reinforcing partnerships between LAC and Canadian researchers and institutions.

It may be appropriate for AUCC and IDRC to examine more closely how LACREG is managed. It appears to the consultant that an effective division of responsibilities is in place but this was never meant to be the focus of the evaluation.

8.0 RECOMMENDATIONS

These recommendations are an attempt to recognize and reinforce what LACREG is currently doing well. At the same time, these recommendations take into account the concerns expressed by LACREG stakeholders about certain inefficiencies. There are issues such as funding where there is a clear consensus about what needs to be done. However, opinions vary on how LACREG can be improved. The evaluator attempted to find compromises between these divergent opinions and consider his own perceptions about what should be done to improve LACREG. To the greatest extent possible, the evaluator has focussed on making recommendations that will serve the interest of all stakeholders. The recommendations are also a realistic attempt to evaluate what such a small grant programme should hope to accomplish in terms of building partnerships.

Regarding LACREG Administration

- It is recommended that the current administrative model be retained, i.e. AUCC overseeing the day-to-day management of the programme. Although this is an IDRC-funded programme, having AUCC oversee LACREG presents the ongoing possibility to promote it within the broader and favourable context of all the different grant programmes that AUCC administers.
- It is recommended that the current approach that allows for a wide range of grant recipients to apply for LACREG be maintained. The strength of LACREG is the diversity of people, research areas and circumstances in which the grants are used.

Regarding Funding levels

- It is recommended that the overall funding envelope be expanded to increase the number of grant recipients each year and to explore new LACREG funding arrangements. Increased funding will be especially necessary if there is a concerted effort to promote LACREG more pro-actively.
- It is recommended that the amount allotted to each grant be increased to allow the possibility of longer stays in the host country or to cover other research-related expenses. This is especially important for potential LAC recipients coming to Canada who may be discouraged by things such as the high cost of temporary housing.

Establishing Two Streams of LACREG Grants

- In the spirit of trying to respond to both institutional aspirations and continuing to contribute to the professional development of researchers and academics, it is recommended that AUCC and IDRC consider establishing two streams of LACREG funding:
 - Stream One: The first stream would be focussed purely on professional development allowing the candidates to develop research and language skills while gaining valuable field experience in either Canada or LAC. In this stream, the grant recipient would not be burdened with any excessive pressure to build sustainable institutional partnership. The grants would be awarded based on potential developmental impacts and alignment with IDRC's developmental priorities. This first stream would be possibly directed mostly at younger academics.

- Stream Two: The second stream would award larger grants, perhaps double the amount of the first stream. The focus would still be joint research but there would be a stronger expectation that a sustainable partnership would emerge. Applicants would be expected to ensure that both the LAC and Canadian partners travel and work in each other's country.

Partners choosing the First stream of professional development would have the option in subsequent years to have the partner who did not travel to apply to the Second stream of the LACREG programme. For example, a Canadian travels to Honduras conducts research and returns to Canada. Two years later, the Honduran partner could apply to come to Canada to solidify a relationship. However, the application process would be subject to the more rigorous criteria found in the Second stream of the LACREG programme.

Regarding the LACREG Application Process

- It is recommended that IDRC and AUCC study how the application process can be simplified to address the key criticism of labour-intensiveness given the small amount of money that is awarded. This should include possibly studying how criteria like gender impacts could be better integrated into the application and selection process.
- It is recommended that IDRC and AUCC study removing the requirement of counterpart funding. In the absence of the removal of this condition, it is recommended that time is taken to identify innovative ways that one might make an in-kind contribution that enhances the overall LACREG experience. For example, giving credit for language training leading up to the LACREG experience would seem to be a very reasonable contribution that furthers the goals of the programme.
- It is recommended that in the absence of accepting the recommendations to establish a 2-stream approach, IDRC and AUCC study how each LACREG grant could ensure greater movement between countries. As it stands right now, it is very common for LACREG grant recipients to share the grant with their partner to allow 2-way travel. It may be possible to formerly recognize this possibility in the grant application process and accommodate it financially by providing slightly larger grants.
- Regardless of the form that LACREG takes in the next round of funding, it is recommended that IDRC and AUCC address concerns relating to establishing more flexible timing for the start and finish times for LACREG.
- It is recommended that LACREG administrators establish procedures to ensure there is no confusion or misunderstanding either on the part of grant recipients or their partners on matters such as the
 - need for LACREG grants to be used for research purposes;
 - fact that research results emanating from LACREG grants are properly shared amongst all stakeholders; and
 - fact that practical matters like the conditions related accommodation in the host country are understood by all parties.

Regarding Gender

- It is recommended that IDRC and AUCC monitor closely the ratio of female LACREG grant recipients. In the event that the number of female grant recipients and applicants begins to decline, LACREG administrators should be prepared to establish promotional activity that specifically targets female researchers and academics in both Canada and LAC.

Regarding Promoting and Broadening the Reach of LACREG

- It is recommended that LACREG administrators continue to maintain a strong promotional strategy in LAC. This strategy could occasionally include events and forums that provide an exceptional opportunity to promote the LACREG programme. A case in point would be the Latin American Researchers Convention to be held in Montreal in September 2007.
- It is recommended that there be an increasing openness towards promoting LACREG amongst non-traditional partners such as NGOs that may conduct beneficial research, contribute to professional development and build sustainable relationships. The same academic standards would apply.

Regarding the Reinforcement of the LACREG Experience

- It is recommended that LACREG administrators consider establishing an Internet site that would be exclusively dedicated to LACREG. In addition to providing updated information on LACREG and other matters like application forms, the site could serve as a clearinghouse on information on other grant programmes that compliment LACREG. The site could also serve as a mechanism for sharing the LACREG experiences of grant recipients possibly in the form of a multilingual blog. The site could also serve as a constant tool in promoting LACREG.

Regarding Relationships with Global Context and Other Programmes

- It is recommended that discussions be undertaken with the International Council for Canadian Studies to determine the circumstances in which LACREG and the Canada- Latin America - Caribbean Award can share common promotion mechanisms. It is also recommended that the administrators of LACREG if possible, identify other grant programmes where there is a degree of complementarity with LACREG that opens up possibilities for shared promotion. The ultimate objective would be to ascertain where there may be opportunities for combining funding to enhance the potential impact of LACREG or to identify a viable alternative for Canadian and LAC academics and researchers.

9.0 CONCLUSION

Although LACREG aims to build institutional partnerships, the strength of LACREG is the personal and professional relations that get enhanced out of the small grants that are awarded. A very legitimate conclusion of this evaluation would have been not to change anything as finally, LACREG is working. However, one can see how it can be improved to make a clear distinction between what LACREG does well consistently (professional development) and what it can do on many occasions but not automatically (building partnerships).

One thing that became very clear is that LACREG has the potential to be enormously more important and popular in LAC in academic and research circles. There is no question that there is a need to establish a steadier and robust stream of applications from LAC. However, in doing so a different dilemma could be created whereby there will be over abundance of applications.

A reinforced LACREG with the potential to continue providing both streams suggested in this report would establish a programme that would be well suited to having an endless array of subtle influences in expanding the horizons of researchers and academics as well as strengthening partnerships in the ever changing context of Canada's relationship with LAC. LACREG is a modest entity responding nicely to the aspirations of many and the increasingly shared development priorities of countries across the Americas. With the proposed slight changes, its importance and utility can only increase.

Annex 1

Individuals Interviewed in Support of the LACREG Evaluation

Montreal

- Olga Marino UQAM (Grant Recipient Colombia), olga.marino@licef.teluq.uqam.ca
- Myriam Fillion UQAM (Grant Recipient Brazil) fillion.myriam@courrier.uqam.ca
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- Sylvain St-Amand UQAM (ILO) st-amand.sylvain@yqam.ca
- Maximillan Sainz UQAM (International Relations Officer for the Americas) sainz.maximiliano@uqam.ca
- Sonia Laszlo McGill (Grant Recipient Peru) sonia.laszlo@mcgill.ca
- Oscar Firbank Université de Montréal (Grant Recipient Argentina) oscar.e.firbank@umontreal.ca
- Louise Rolland Université de Montréal (Grant Recipient Mexico) louise.rolland@umontreal.ca
- Yenny Vega Cardenas Université de Montréal (Participant in Mexico mission and 2007 applicant) yenny.vega.cardenas@umontreal.ca

Toronto

- Monica Riutort University of Toronto (Grant Recipient Colombia) monica.riutort@utoronto.ca
- Adrien Shubert York University (ILO) ashubert@york.ca
- Ricardo Grinspun York University (Former Director of the Centre for Research on Latin America and the Caribbean CERLAC) ricardo@york.ca
- Howard Daugherty York University (Professor supervising field work of multiple LACREG Grant Recipients) jaguar@yorku.ca
- Brent Rutherford York University (Grant Recipient) brent@yorku.ca
- Drew Knight, Director of International Programs, University of Waterloo, dknight@uwaterloo.ca

Additional Phone Interviews in Canada

- Leanne Leclair (University of Manitoba Grant Recipient Cuba), leclairl@cc.umanitoba.ca
- Daniele Belanger (University of Western Ontario, Grant Recipient Cuba) dbelang@uwo.ca
- Allen Curry (University of New Brunswick, Grant Recipient Cuba) racurry@unb.ca
- Sandra Brown (University of British Columbia, Grant Recipient Colombia) sjbrown@interchange.ubc.ca
- Robert Hausler, École polytechnique (Host of Colombian Recipient) Robert.Hausler@etsmtl.ca

- Carl Lowenberger (University of Simon Fraser, two time Grant Recipient Colombia and Mexico) clowenbe@sfu.ca
- Paula Pelaez (Colombian doing Masters at York) Paula@care.ca
- Christiane Paponnet-Cantat (University of New Brunswick, Grant Recipient Cuba) paponnet@unb.ca
- Mónica Torres (Colombian grant recipient now residing in Canada) monitorres@yahoo.com
- David Robinson (University of Malaspina, Grant Recipient Costa Rica) Robinson@MALA.BC.CA
- Susan Lajoie (McGill University, Grant Recipient Mexico) susanne.lajoie@mcgill.ca
- Alain.Beaufils (University of Quebec at Gatineau, Host of Colombian Grant Recipient), alain.beaufils@uqo.ca
- Allison Henderson (former Simon Fraser Graduate Student current employee Parks Canada and Grant Recipient, Costa Rica) allison_henderson@sfu.ca

Cuba

- Alejandro R Socorro (Universidad de Cienfuegos Cuba, Host country partner of Canadian grant recipient) asocorro@ucf.edu.cu
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- Staff at Las Nubes Tropical Rainforest Reserve
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Annex 2

List of Documents Consulted During Initial Document Review

- Report of the internal evaluation of LACREG conducted by Patrick Hyndman in 1998
- LACREG Annual Reports produced by AUCC
- LACREG grant proposals
- Final Reports submitted by LACREG Grant Recipients
- Comments of Selection committee members on grant applications
- Publications that LACREG grant recipients attribute to LACREG.
- Documents relating to other grant programmes
- Other internal documents related to the administration of LACREG

Annex 3

Questionnaire templates

**Evaluation of the
Canada-Latin America and the Caribbean
Research Exchange Grants (LACREG) program**

Questionnaire for Latin America and Caribbean (LAC) Grant Recipients

*AUCC and IDRC are undertaking an evaluation of the **Canada-Latin America and the Caribbean Research Exchange Grants Program (LACREG)**. LACREG was launched in late 1995 to allow Canadian and Latin American and Caribbean (LAC) researchers to learn about each other and collaborate on development issues of mutual concern. This evaluation is designed to assess LACREG's relevance and usefulness. As part of the evaluation process, specific questionnaires have been developed for various stakeholder groups. This particular questionnaire is designed to ascertain the perceptions and ideas of LAC grant recipients on how LACREG can be improved.*

- 1) In terms of your own professional development, explain how you benefited from your LACREG supported experience in Canada? This can mean research, publishing, international experience or language skill development.
- 2) Have you maintained professional relationships with the Canadian counterparts that you collaborated with through the LACREG grant?
- 3) Did your LACREG experience lead to stronger institutional partnership between your university and the Canadian institution that hosted you? Please elaborate.
- 4) Did your LACREG experience lead to collaborations with other Canadian counterparts or institutions?
- 5) What were some aspects of your LACREG experience with which you were less satisfied?
- 6) In your experience, how critical has LACREG been (therefore necessary), and what else has been required or would be, to build sustainable relationships?
- 7) How valuable do you find LACREG compared to other research grants and programs that are available to LAC academics and graduate students who may be interested in pursuing endeavors outside their country? How dispensable or indispensable is it? Does it serve a purpose unattended to by most other programs known to you?
- 8) From a LAC perspective, what changes would you like to see made to LACREG? This can include the selection criteria or the program's objectives.
- 9) Would you have an opinion as to why the number of successful LAC applications to the LACREG program is on the decline?
- 10) In light of your opinion on why the number of successful LAC applications is on the decline,

do you have any suggestions regarding how the candidate recruitment and application process can be changed to encourage more successful LAC candidates?

11) Could you suggest any avenues for promoting LACREG in your country and throughout LAC?

12) Can you think of any changes you would like to see made to LACREG? How would these changes enhance the international ambitions of your institution and/or the professional development of LAC academics?

13) Could you please give us the name, title, e-mail address and phone number of your institution's the director of international relations (or the person coordinating international activities the institutional level)?

14) Other comments?

**Evaluation of the
Canada-Latin America and the Caribbean
Research Exchange Grants (LACREG) program**

Questionnaire for Canadian Grant Recipients

*AUCC and IDRC are undertaking an evaluation of the **Canada-Latin America and the Caribbean Research Exchange Grants Program (LACREG)**. LACREG was launched in late 1995 to allow Canadian and Latin American and Caribbean (LAC) researchers to learn about each other and collaborate on development issues of mutual concern. This evaluation is designed to assess LACREG's relevance and usefulness. As part of the evaluation process, specific questionnaires have been developed for various stakeholder groups. This particular questionnaire is designed to ascertain the perceptions and ideas of Canadian grant recipients on how LACREG can be improved.*

- 1) In terms of your own professional development, explain how you benefited from your LACREG supported experience in LAC? This can mean research, publishing, international experience or language skill development.
- 2) Have you maintained professional relationships with the LAC counterparts that collaborated with you through the LACREG grant?
- 3) Did your LACREG sponsored experience lead to stronger institutional partnership between your university and your partner LAC institution? Please elaborate.
- 4) Did your LACREG experience lead to collaborations with other LAC counterparts or institutions?
- 5) What were some aspects of your LACREG experience with which you were less satisfied?
- 6) In your experience, how critical has LACREG been (therefore necessary), and what else has been required or would be, to build sustainable relationships?
- 7) How useful do you find LACREG compared to other research grants and programs that are available to Canadian academics and graduate students who may be interested in pursuing professional interests in LAC?
- 8) From a Canadian academic or graduate student perspective, what changes would you like to see made to LACREG? This can include the selection criteria or the program's objectives.
- 9) Do you see ways in which LACREG could better promote the international ambitions of your institution? If yes, how? If not, why not?
- 10) Do you see ways in which LACREG could better support the professional development of senior academics or graduate students? If yes, how? If not, why not?
- 11) Other comments?

**Evaluation of the
Canada-Latin America and the Caribbean
Research Exchange Grants (LACREG) program**

Questionnaire for Selection Committee Members

*AUCC and IDRC are undertaking an evaluation of the **Canada-Latin America and the Caribbean Research Exchange Grants Program (LACREG)**. LACREG was launched in late 1995 to allow Canadian and Latin American and Caribbean (LAC) researchers to learn about each other and collaborate on development issues of mutual concern. This evaluation is designed to assess LACREG's relevance and usefulness. As part of the evaluation process, specific questionnaires have been developed for various stakeholder groups. This particular questionnaire is designed to ascertain the perceptions and ideas of selection committee members on how LACREG can be improved.*

- 1) Describe your involvement in the evaluation of LACREG grants.
- 2) During your time as a selection committee member, what have been or what were some important trends or findings that struck a chord with you?
- 3) From a high of 11 in 1996, to a low of 1 in 2000 and just 5 in 2005, the trend is towards a diminishing number of grants being awarded to LAC academics. Do you have any insight as to why this is occurring?
- 4) In terms of lower ranking applications, what are some of the more pronounced reasons why applications score lower?
- 5) What are the common characteristics of strong LACREG proposals?
- 6) Under the current system, do you feel that there are some worthy proposals that are not being supported because they do not fulfill LACREG guidelines?
- 7) Do you feel the selection process should differentiate between applications from graduate students and established academics? Explain.
- 8) In terms of building institutional relations, how difficult is it to assess the potential impact of successful LACREG grants?
- 9) What is your opinion of the importance placed on LACREG grants as tools to build partnerships between Canadian and LAC institutions?
- 10) What changes would you recommend to encourage more successful LAC applicants?
- 11) Without diluting academic and research standards, what do you think of changing selection criteria to better account for the distinct capabilities and challenges faced by Canadian and LAC academics?

12) What changes would you like to see made to LACREG in terms of the core objectives?

13) In your experience, what is the value-added of LACREG compared to other research grants and programs that are available to Canadian and LAC academics and graduate students who may be interested in pursuing endeavors internationally?

14) Other comments?

**Evaluation of the
Canada-Latin America and the Caribbean
Research Exchange Grants (LACREG) program**

Questionnaire for International Liaison Officers

*AUCC and IDRC are undertaking an evaluation of the **Canada-Latin America and the Caribbean Research Exchange Grants Program (LACREG)**. LACREG was launched in late 1995 to allow Canadian and Latin American and Caribbean (LAC) researchers to learn about each other and collaborate on development issues of mutual concern. This evaluation is designed to assess LACREG's relevance and usefulness. As part of the evaluation process, specific questionnaires have been developed for various stakeholder groups. This particular questionnaire is designed for ILOs who, as representatives of Canadian universities, have a unique and critical perspective on LACREG and its relevance to Canadian universities and their international activity in Latin America and the Caribbean.*

- 1) What is the current interest at your institution in research about LAC and the LACREG program?
- 2) In your opinion, is interest in LACREG increasing or waning? Please explain.
- 3) What is the institutional perception of LACREG in terms of its importance in building relationships with LAC institutions?
- 4) Has a LACREG grant(s) ever played a critical role in establishing an institutional relationship?
- 5) From an institutional perspective, what are other positive impacts of LACREG?
- 6) From an institutional standpoint, what do you see as the shortcomings of LACREG?
- 7) Does your institution make a distinction between the benefits and usefulness of LACREG in terms of supporting the work of established academics as opposed to graduate students?
- 8) How useful is LACREG compared to other research grants and programs that are available to Canadian academics and graduate students who may be interested in pursuing endeavours internationally?
- 9) Has your institution ever hosted a LAC recipient of a LACREG grant? How beneficial was this experience?
- 10) Can you think of any changes you would like to see made to LACREG? How would these changes enhance the international ambitions of your institution?
- 11) How do you promote the program within your institution?
- 12) How are LACREG proposals usually handled within your institution? Who takes the lead in drafting the proposal?

13) Any other comments?