

## for a CGIAR without Boundaries



#### **CGIAR**

The Consultative Group on International Agricultural Research (CGIAR) is a strategic alliance of countries, international and regional organizations, and private foundations supporting 15 international agricultural centers, which work with national agricultural research systems and civil society organizations, including the private sector. The alliance mobilizes agricultural science to reduce poverty, foster human wellbeing, promote agricultural growth, and protect the environment. www.cgiar.org

#### **ICT-KM Program**

The Information and Communications Technology-Knowledge Management (ICT-KM) Program of the CGIAR promotes and supports the use of ICTs and KM to improve the effectiveness of the CGIAR's work on behalf of the poor in developing countries. www.ictkm.cgiar.org

#### CIAT

The International Center for Tropical Agriculture (CIAT) is a not-for-profit organization that conducts socially and environmentally progressive research aimed at reducing hunger and poverty and preserving natural resources in developing countries.

www.ciat.cgiar.org

#### **CIFOR**

The Center for International Forestry Research (CIFOR) is an international research and global knowledge institution committed to conserving forests and improving the livelihoods of people in the tropics. CIFOR's high impact research helps local communities and small farmers gain their rightful share of forest resources, while increasing the production and value of forest products.

www.cifor.cgiar.org

#### **CIMMYT**

The International Center for Maize and Wheat Improvement (CIMMYT) is a nonprofit research and training center with direct links to about 100 developing countries through offices in Asia, Africa, and Latin America.

www.cimmyt.org

#### **IWMI**

The International Water Management Institute (IWMI) is a nonprofit scientific organization whose research agenda is organized around four priority themes covering key issues relating to land, water, livelihoods, health and environment. The institute concentrates on water and related land management challenges faced by poor rural communities.

www.iwmi.cgiar.org

#### **Bellanet**

The Bellanet International Secretariat is a multidonor initiative created with the mission to promote and facilitate effective collaboration within the international development community, especially through the use of information and communication technologies (ICTs). www.bellanet.org

# Knowledge Sharing Solutions for a CGIAR without Boundaries

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CIAT Publication No. 346 ISBN 958-694-080-2 Press run: 500 Printed in Colombia November 2005

Knowledge sharing solutions for a CGIAR without boundaries / edited by Nathan Russell and Simone Staiger-Rivas. -- Cali, CO: Centro Internacional de Agricultura Tropical (CIAT); Consultative Group on International Agricultural Research (CGIAR), 2005. 24 p. -- (CIAT publication no. 346) ISBN 958-694-080-2

#### AGROVOC descriptors in English:

Knowledge management. 2. Communication technology. 3. International organizations. 4. CGIAR. 5. Human resources. 6. Training. 7. Partnerships. 8. Cultural values. 9. Information systems. 10. Diffusion of research. 11. Evaluation. 12. Innovation adoption. 13. Asia. 14. America. 15. Colombia.

#### Local descriptors in English:

1. Participatory research.

#### AGROVOC descriptors in Spanish:

- Gestión del conocimiento.
   Tecnología de comunicación.
   Organizaciones internacionales.
   GCIAI.
   Recursos humanos.
   Capacitación.
   Valores culturales.
   Sistemas de información.
   Difusión de la investigación.
- 11. Evaluación. 12. Adopción de innovaciones. 13. Asia. 14. América. 15. Colombia.

#### Local descriptors in Spanish:

- 1. Investigación participativa.
- I. Russell, Nathan. II. Staiger Rivas, Simone. III. Centro Internacional de Agricultura Tropical. IV. Consultative Group on International Agricultural Research.

AGRIS subject category: C20 Extension / Extensión

LC classification: 67222

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#### **Contents**

Preface	V
Meeting Face to Face: An Entry Point for Knowledge Sharing	1
A New Formula for CIAT's Annual Staff Meeting	3
Sharing Knowledge on Wheat Improvement at CIMMYT	9
Working Together to Make a Difference: CIFOR's Annual Meeting	14
Skills and Resources to Enhance Knowledge Sharing	20
Lessons Learned and Future Directions	22



#### **Preface**

he face of tropical agriculture is being radically and rapidly transformed by economic globalization, by environmental pressures, such as climate change and land degradation, and by the spread of new information and communications technologies (ICTs).

The CGIAR has responded to these challenges in several ways. First, it has expanded its research agenda to put more emphasis on poverty reduction and natural resource conservation. And second, the international centers have decentralized to make their work more relevant to a diverse clientele. Challenge Programs, which tackle issues of global significance through broad partnerships, are one recent reflection of the CGIAR's responsiveness to a changing global environment.

To respond more effectively to the changing needs of clients and partners, the CGIAR centers need to do a better job of sharing the vast amount of scientific and other knowledge that they generate each year through collaborative research. This precious resource resides not only in databases, gene banks, and publications but also in the minds of center scientists.

Efforts to foster knowledge sharing among centers and partners have tended to focus on better management of information flows and on the capture of codified knowledge resulting from agricultural research. Though necessary and important, these activities are not sufficient for helping scientists deal with the complex challenges of sustainable agricultural development.

In search of more effective approaches, several centers have embarked on a significant new effort to foment a knowledge sharing, or KS, culture within the

CGIAR. Funded by the World Bank through the CGIAR's ICT-KM (Information and Communications Technology -Knowledge Management) Program, the KS Project is contributing importantly to the program's vision of "a CGIAR without boundaries, an internationally distributed, unified, and open knowledge organization." Toward this end the KS Project has adopted a practical approach that builds on previous efforts to enhance KS in the centers.

An earlier project on this subject the Ford Foundation funded Organizational Change Program (OCP) succeeded in







bringing KS to the attention of a large audience in the CGIAR. It also provided KS training and orientation and led to the elaboration of comprehensive KS strategies in selected centers. They made little progress toward implementing those strategies, however, and project participants concluded that more commitment was required on the part of center management, supported by human resources policies conducive to KS and further capacity building.

In close collaboration with Canada's Bellanet International Secretariat, the KS Project has pursued a complementary approach that involves incorporating KS principles and approaches into important center events. The idea is that by creating opportunities for center management and staff to experiment with these approaches, the project can demonstrate their value as means of facilitating organizational change and research collaboration.

The project has worked toward this end mainly through four pilot initiatives, carried out at the International Center for Tropical Agriculture (CIAT), Center for International Forestry Research (CIFOR), International Maize and Wheat Improvement Center (CIMMYT), and International Water Management Institute (IWMI). The project has also carried out important complementary activities, including a study of human resource policies in relation to KS and to institutional learning and change, a training course in facilitation skills, development of an online KS tool kit, and guest editing of a new online journal published on behalf of the global KM4Dev community of practice. The human resources study and facilitation training were done in collaboration with the CGIAR Institutional Learning and Change (ILAC) Initiative.

This case study report documents the four pilot initiatives, which were carried out by groups of center staff from 2004 to 2005, with strong support from the KS Project team. The report also briefly describes the complementary activities, cites lessons learned about major meetings as entry points for KS in research and development organizations, and points to future directions for work on KS in the CGIAR.

The report is designed to spark the interest of all those in the CGIAR centers and their partner organizations who seek to make better use of the scientific and related knowledge available within the global agricultural research community.

We wish to thank all the CGIAR center staff and others who participated in KS Project activities, with special mention of the coordination teams of the four pilot initiatives. The success of the pilots was due in large measure to their persistent efforts and creativity, coupled with the goodwill of all center staff who contributed. We believe we're off to a fresh, promising new start in how we share knowledge within the CGIAR.

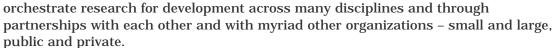
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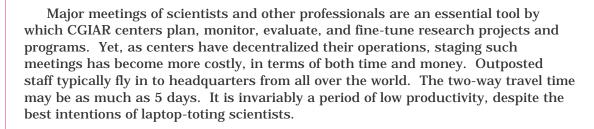


## Meeting Face to Face: An Entry Point for Knowledge Sharing

The Web site of a popular Internet service provider recently listed top time-wasting behaviors in the office. Not surprisingly, experts cited attendance at meetings as a major culprit. Nonetheless, face-to-face meetings remain an essential part of modern institutional life. When conducted effectively, they help us plan our work, reach consensus, and avoid mistakes. They can also be a fertile venue for getting to know one another and sharing knowledge. That knowledge includes the personal experience and insights of staff members – the so-called "tacit" knowledge that somehow manages to elude capture and codification by more formal media like project reports.

The work of the CGIAR's research centers and partner organizations covers a huge swath of scientific and geographic territory: agriculture, forestry, fisheries, and related policy and environmental issues on four continents. In going about their work, centers and partners must







#### Concerns about annual meetings

CIAT research director Douglas Pachico recalls the recent history of the center's annual meeting and some of the staff dissatisfaction surrounding it: "From 1998 to 2001, the meeting organized by management was called Planning Week. But then a number of people were unhappy with the fact that the sessions didn't result in the concrete work plans they had hoped for." As a stopgap measure for 2002 and 2003, he explains, "We changed the name to Meeting Week. But I can't think of a more unsatisfactory name than that!"

During the 2002 meeting, Pachico recalls, a number of people also articulated concerns about "the atomization of our research process" and the need for better cross-project collaboration and regional integration. "I believe some of those concerns are addressed by the agenda of the 2004 Knowledge Sharing Week."



Extracting the greatest benefit from such large investments in international travel and staff time is understandably a perennial concern of managers in all CGIAR centers. What personal and institutional benefits should center staff and managers expect from major meetings? And what can be done to ensure these meetings help the CGIAR achieve the broader goals of sustainable rural development and the alleviation of hunger and poverty?

One route to enhancing the value of major meetings in the CGIAR is to make them more dynamic and effective as occasions for knowledge sharing and learning. The idea is to move beyond the mere presentation of data and information, typified by one-way, show-and-tell sessions punctuated by the phrase "next slide please." As key events for planning and evaluation, major staff gatherings are an opportunity for large numbers of scientists to interact face to face and build the personal relationships of trust and understanding that are so vital for effective teamwork.



Interactions between centers' headquarters and regional staff are especially important. But the principle also applies to relationships within headquarters. Geographic dispersion is not the only barrier to good working relationships. In most organizations it's easy to find ingrained behaviors and aspects of institutional culture that act as barriers to communication.

To demonstrate exactly how key events can serve as entry points for KS, the KS Project of the CGIAR's ICT-KM Program planned and supported four pilot initiatives in as many centers during 2004-2005, in close collaboration with center staff. In the sections that follow, we provide first-hand accounts of those initiatives, describing how they were planned and implemented and with what results, from the multiple viewpoints of center management and staff.



#### A New Formula for CIAT's Annual Staff Meeting

Like most other CGIAR centers, CIAT has a long tradition of annual meetings of professional staff. The format has typically focused on plenary sessions, in which researchers deliver formal PowerPoint presentations, followed by questions and discussion. In addition, time is usually allotted for project teams and other groups to review on-going activities and plan future work.

Here, as elsewhere, though, many feel the time spent in annual staff meetings isn't used as well as it could be. Too many hours, they say, are consumed by formal presentations, with little in-depth discussion of "burning issues." There are few opportunities for the more or less 100 people to get to know each other and establish the collegial relationships that are essential for creative scientific collaboration.

In an effort to address those concerns, the KS Project proposed to CIAT management a major overhaul of its annual staff meeting. The idea was to try an alternative formula that would help staff share knowledge, broaden communication, stimulate dialog, and strengthen personal relationships.

A five-member coordination team, with strong skills in KS, information management, communications, and monitoring and evaluation was established to work with CIAT management in planning and carrying out the meeting. The team included Doug Horton, KS Project coordinator, and Allison Hewlitt, a senior

program officer from Canada's Bellanet International Secretariat, which is a key partner in the project.

One of the coordination team's first tasks was to help management define the meeting's objectives. The team then met with a range of other CIAT staff—in face-to-face meetings at headquarters and via telephone with outposted staff—to check the relevance of the proposed objectives and get reactions to alternative meeting designs. As a result, the week-long meeting (called "KS Week") was organized around four objectives:

- 1. Develop a shared understanding of three major new initiatives at CIAT (referred to as "research-for-development challenges") and contribute to their effective operationalization.
- 2. Enhance the integration of headquarters and regional staff and activities.
- 3. Promote effective work planning on the part of project teams and collaborators.
- 4. Demonstrate how KS techniques can help center staff.

#### The gathering of the clan: An Open Space session on new initiatives

The coordination team selected well-known KS approaches and complementary measures to achieve the meeting's objectives. The Open Space approach was used to involve about 85 staff in a 2-day session on planning how the center should move forward to operationalize the research-for-development challenges.





#### Open Space: Off the beaten path

A document prepared for the Canadian International Development Agency (CIDA) defines Open Space as a "way of holding meetings that develops leadership and opens up communication." It encourages "openness, initiative, choice, responsibility, and pleasure to work together. It is a process that takes us away from the beaten path."

Allison Hewlitt, a senior program officer at Bellanet, was the principal facilitator for CIAT's 2004 KS Week as well as for the other three pilot initiatives undertaken by the KS Project and participating centers. At CIAT she used the Open-Space technique to help participants address the first



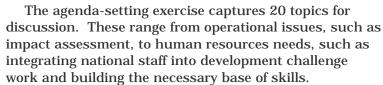
objective of KS Week, namely to reach a common understanding of the center's three researchfor-development challenges and find ways to operationalize them.

"This way of conducting meetings is different than what most people are used to," says Hewlitt. "It brings people together to create their own agenda, a set of topics or issues of special interest to them, rather than having management or conference organizers decide in advance what's most important to everybody. An underlying principle is that those who care about a certain topic or issue are more likely to move it forward than those who are forced into doing something that may or may not be of interest or value to them. So, we're really trying to tap into people's passions and interests."

Open Space is a highly democratic method of group agenda setting, followed by small-group discussion, reporting, and preparation of action plans. The session was held in an expansive open-air setting: the covered patio that forms the northern side of the CIAT campus quadrangle.

With participants sitting side by side in a large ellipse, the facilitator invites the group to set the agenda for the next 2 days of discussion on the development challenges. All those with an issue, idea, or question they feel should be aired are asked to write down their topics on cards and then advance, one by one, to the center of the circle to introduce the topic. The one condition imposed by the facilitator is that each person suggesting a topic be prepared to lead a discussion

group and arrange for the preparation of a short report.



Once the contributors have posted their cards on display boards, the group at large is invited to select those topics that most interest them. The scheduling allows for each person to attend up to two of the 19 resulting breakout sessions, each of which will last 90 minutes. By the end of the day, 19 written reports have been compiled for review by all participants on day 2.



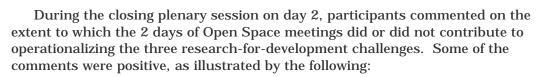


To end the first day's proceedings—or, in the lingo of Open Space practitioners, "to close the circle"—each person shares with the group a word or phrase that captures her or his impression of the day's work. Here is a sampling of results from passing the microphone from person to person: "provocative ... multifaceted ... confusing ... interesting ... unbounded ... challenging ... frank ... social ... fresh ... energetic ... hard work ... diversity ... listening ... learning ... opportunity ... intriguing."

On day 2 of the Open Space session, participants begin their work by reading the discussion reports prepared the previous day and prioritizing them through ballot voting. Eight of the 19 topics/reports are selected for further discussion and conversion into seven action plans.

Voting again, this time with their feet, participants speed off to find the nooks and crannies where their 2-hour action plan meetings are to take place. Each discussion leader is armed with an action-plan guideline sheet to ensure a measure of consistency across the seven discussions and reports. Among the guiding questions: What do you want to do now to move forward? What are the actions to get there? Who else do we need to enroll?

After the meetings, a rapporteur from each group records the action plan and in the afternoon presents the plan in plenary.



- Holding the plenary sessions outdoors was a very positive change.
- Change requires participation. The Open Space sessions provided for a good experience in that regard.
- "I appreciated the experimental, novel approach."
- "It is impressive that priorities were reached so quickly. We now need to put our money where our mouth is."

In addition to this type of generally positive comment, there was, nevertheless, a recurring message: Despite the progress made in formulating action plans, there was still considerable confusion about how CIAT's work should be integrated under the three research-for-development challenges.

- While the meeting format was effective in bringing people together, the discussion did not fully focus on the theme of operationalizing the development challenges. "I think we missed the target over the past couple of days."
- "I had wanted to put meat on the development challenges, but we haven't done that."







#### The people must be entertained



Llama Lluvia, a Colombian musical group, entertained staff in the cafeteria on the evening of day 1 of KS Week. Their performance included a musical tour-du-monde with songs and instrumentals from 18 countries. Other social events included dinner at an Italian restaurant in Cali and, on the final evening of KS Week, a party and buffet dinner, complete with live music and dancing, hosted by the director general at his home.

#### A Knowledge Fair on research-support services

A Knowledge Fair was used to address the meeting's second objective, namely that of integration between CIAT's headquarters and regional staff. The fair was organized in the form of a 5-hour-long exhibition of support services available within CIAT and of other scientific organizations that share the center's campus. It was a bottom-up exercise: Support staff designed the displays and were present to answer visitors' questions and provide services on the spot. The Knowledge Fair focused specifically on support services because of a perception that staff based outside of headquarters, many on other continents, have particular difficulty in accessing these services and in knowing who is doing what.



As people moved from booth to booth along the outdoor walkways of the CIAT quadrangle, they were greeted by a wandering white-faced mime—a local performer well known for his antics on the sidewalks of Cali. The job of this Charlie Chaplin look-alike was to put a smile on the faces of passers-by and pique their curiosity about the fair—all without a spoken word in Spanish, English, or any other language.

One senior staff member from Asia reported having an enormously productive tour of the stands. At the

Information Systems stand, staff helped him solve a computer problem; at the Human Resources stand a contract was finalized; and at the Finances stand, a financial difficulty was successfully resolved.

#### Peer Assists for regional and headquarters integration

The Peer Assist method—an approach for tapping the knowledge and experience of colleagues in problem solving—was used as a further aid to headquarters/regional integration. Managers and staff members were invited to present problems that they personally had experienced, related to relations between headquarters and the regions. Seven individuals were selected to present their problem in a small-group setting. Examples of the problems include:

What to do when you (a regional staff member) find out that a project has been developed at headquarters and now you're supposed to implement it?



- What to do (if you're the research director) when someone comes to your office to complain that they should have been, but weren't, involved in the development of a project that has now been approved?
- What to do when you (a regional staff nmember) find that you have three bosses, three work plans, and no operating budget?

Like the Open Space technique, the Peer Assist encourages interaction, in that participants present a problem of their choosing and others may offer advice or analysis as they see fit, on the basis of their personal interest and experience with similar situations. Those who present the problem benefit from the collective wisdom of the group. Others frequently benefit from the interactions, as they realize they possess knowledge and experience of use to others.

In addition to the Open Space session, Fair, and Peer Assist, KS week's agenda included a question-and-answer session with the director general, and the Professional Staff Association held a meeting aimed at fostering discussion between outposted and headquarters staff and assessing the needs and concerns of outposted staff. Members of a community of practice of 40 researchers working on aspects of rural innovation at CIAT held a workshop on a method called "Appreciate Inquiry," with the objective of creating a shared vision for the group. Other events included presentations on CIAT's work in three regions and a session on "business process reengineering." One day of the week was left free for informal meetings.



#### Staff evaluation of KS week

Whether center staff find KS approaches helpful (thus fulfilling the meeting's fourth objective) and begin incorporating them into other activities depends obviously on the effectiveness of these approaches. The coordination team employed two techniques for gauging the utility of KS Week and identifying ways to improve it.

First, a "barometer team"—consisting of five headquarters staff, four outposted staff, the meeting facilitator, and one other communications consultant—was formed to monitor the week's activities and recommend ways to make future meetings more effective. For this purpose the team conducted After Action Reviews. Meeting three times during KS Week, the team made 48 recommendations related to the event's strengths and weaknesses directly observed by team members or reported to them by other participants. In a particularly significant observation on the Open Space event, the barometer team recognized that many CIAT staff did not grasp the development challenges in sufficient detail to be able to design action plans. "We should have done a better job of determining whether people understood the topic well enough to discuss it," commented one team member.



#### From sedentary to interactive

Eliaineny Minja, a CIAT entomologist based in Arusha, Tanzania, conducts farmer-participatory research on integrated pest management for beans.

"I attended the staff meetings 2 years ago. I think it was a rather sedentary approach then—listening to presentations, where the opportunity to contribute was very little. It wasn't as interactive as what I'm observing this week, where everyone is having a chance to think about issues and contribute openly. I think that's the way forward because we have to link with different partners and work with them openly. This is an opportunity for us scientists to learn how to interact better with different people, by starting among ourselves."

The second approach for judging the usefulness of CIAT's KS Week was a formal evaluation, carried out during the final session of KS Week. Most KS Week participants surveyed were positive about it and felt the meeting had improved communication and relationships and demonstrated the value of KS techniques. While it is difficult to assess the usefulness of specific KS tools, apart from the usefulness of the sessions in which they were used, most participants indicated they had found the Peer Assist, Knowledge Fair, and Open-Space approaches useful.



They also expressed interest in using these approaches in the future and felt they should be incorporated into CIAT projects. Moreover, they suggested that special attention should be paid to involving nationally recruited staff members more fully in KS activities.

When asked to compare KS Week with previous annual meetings, participants responded that the communication and interaction were more effective than in other years. They also appreciated not being confined to closed, dark rooms for lengthy PowerPoint presentations. Nonetheless, one aspect of previous meetings that participants preferred over KS Week was the exchange of scientific information on work in progress, results and impacts. They suggested that some mechanism be found to facilitate the exchange of such information, but without returning to the previous format of nonstop presentations with limited discussion.

In his closing remarks, director general Joachim Voss alluded to the many practical lessons learned during KS Week. "This has been an experiment. Like any experiment, some things worked well and some not so well. Now we can take the best of what we've learned this week and apply it in the future."



### Sharing Knowledge on Wheat Improvement at CIMMYT

CIMMYT has a long tradition of world-class wheat science. The most recent embodiment of this legacy is the Wheat Improvement Group (WIG), a research team of some 30 members spread across seven countries. In the spring of 2005, the center's wheat research station at Ciudad Obregón in northwestern Mexico provided the setting for a 3-day workshop, the first annual meeting of this newly reconstituted wheat group.

A number of problems have plagued past collaboration among wheat scientists. First, sharing knowledge among staff, who are scattered across the globe, has posed a number of logistical challenges. Second, budgets and other administrative matters have tended to dominate meeting agendas, pushing key scientific issues to the back burner. Finally, conventional meeting formats have not been conducive to creative participation and effective KS.

CIMMYT has a new strategic plan and recently reorganized itself into six multidisciplinary programs to implement the plan. Knowledge management (KM) is highlighted in the center's mission statement and is part of the mandate of one of the programs. Complementing the programs are several thematic groups, including WIG, whose job it is to ensure scientific rigor in CIMMYT's research and foster innovation.

The WIG meeting was planned by two meeting facilitators (Allison Hewlitt of Bellanet and KS Project coordinator Doug Horton) with the WIG coordinator Richard Trethowan, and

other CIMMYT staff, once the following objectives were defined:

- 1. Clarify how WIG can contribute to the center's priority areas of work.
- Contribute to the formation of a well-integrated team of scientists who share knowledge and information and who work towards common goals.
- 3. Use the collective wisdom of the group to develop plans to solve some of the key science issues confronting wheat improvement.





A final objective was specifically related to improved KS:

4. Record lessons and good practices that can be shared within CIMMYT and the CGIAR.



#### Open Space: Setting the agenda

On Wednesday morning, with 39 people sitting in a large circle in the *bodega* (a warehouse that serves as a site for sorting and packing wheat seed samples), WIG coordinator Trethowan formally opened the group's first annual meeting. He stressed that the meeting would be an opportunity to discuss wheat science, specifically how to conduct high-quality research for CIMMYT's programs.



One of the facilitators then explained the Open Space approach. During the facilitator's introduction, a scientist strongly objected to the process proposed and to the presence of the facilitators from the KS Project team—"Here we go again with a couple of management consultants who are going to waste our time and distract us from our own agenda." It was clear that he wasn't alone. There seemed to be particular concern about the large amount of time allocated to the exerciseespecially in light of the brevity of the overall meeting. He preferred to have a more formal structure imposed on the meeting at the outset.

The objection stopped the flow of the meeting dead in its tracks. There was an uncomfortable edge to the opening session. The facilitators offered further

explanation of the process and Trethowan asked the group for a measure of trust. The session then continued as planned. Participants with topics to propose wrote them down on cards. All the cards were posted on a wall—the "marketplace"—with times and locations of discussion groups.

The topics identified by participants covered a lot of scientific territory—from wheat breeding strategies to training for national research systems and

#### Breaking the mold

At the first meeting of CIMMYT's Wheat Improvement Group (WIG), participant Dave Hodson wears two hats. On the one hand, his work as head of CIMMYT's Geographical Information Systems (GIS) Unit links directly to research in the biological and socioeconomic aspects of wheat improvement. Spatial targeting of improved germplasm is of special significance for him. So, his presence here is strongly motivated by the scientific components. On the other hand, Hodson also chairs CIMMYT's KM working group.

"Apart from my GIS work, I'm also here to observe the process of knowledge sharing to see if and how it works with the Wheat Improvement Group. The overall idea is that we can, hopefully, learn from this process—take the positive aspects and apply them to other disciplinary groups within CIMMYT and to the programs. A big plus so far is that we've broken the mold—we've changed the way in which meetings have been traditionally run within CIMMYT. That's a huge leap forward.



biotechnology applications. The small-group discussions were generally animated, focused and at times provocative. Over the course of the day, participants continued to add new topics to the marketplace. Space had been created to discuss all issues of importance and participants were now willing to take advantage of it.

By the end of the day, participants were engaged and energized and requesting additional time the following day to continue their discussions. When participants were asked to share their impressions of the day in a phrase or sentence, their responses included the following: "Where's the low morale?... I take my hat off to you all.... How can we put words into action?... Cross-fertilization of ideas.... I can now put faces to names.... Glad not to have regular presentations.... Hope we can get into the science tomorrow."

#### Ranking topics and action planning

Most of the second day, Thursday, was devoted to discussion of selected topics and to drafting of action plans for those priority topics. This process began with a 20-minute period of reading followed by quiet discussion of the brief reports that came out of the previous day's discussions.

Upon completion of a voting process, the WIG coordinator announced the five priority topics for further discussion and action planning. One of the facilitators then briefly ran through some of the necessities of a good action plan—concrete elements such as goals, who will execute the plan, in what time frame and with what resources. With those guidelines made clear, the participants broke into subgroups. Once again, the discussions were lively, detailed, and fruitful, resulting in five plans.

With day 2 of open space complete, what did the participants think of the process and results so far? Brief comments during the closing of the circle just before adjournment offer a few hints: "provocative ... interactive ... even better ... anxious ... mesmerized ... don't know what to believe ... family ... hungry ... tequila!"

#### Peer Assists: Colleagues helping colleagues

On the last day, 30 people, including the KS Project team, congregated in the bodega for the Peer Assist sessions. Here are two examples of the problems the peer assistees elected to share with their peers:

- How to cope with the logistical and security problems of running a CIMMYT office in a challenging location: Afghanistan
- How to balance the need for product development with scientists' need to publish

After a first round of discussions, lasting about half an hour, peer assistees and their facilitators moved on to the next group, bringing their flip charts with them. Thus, each assistee benefited from the wisdom of another group, not just the initial subgroup of interested parties.

Assistees, facilitators, and participants at large expressed a variety of observations on the sessions. A sampling:

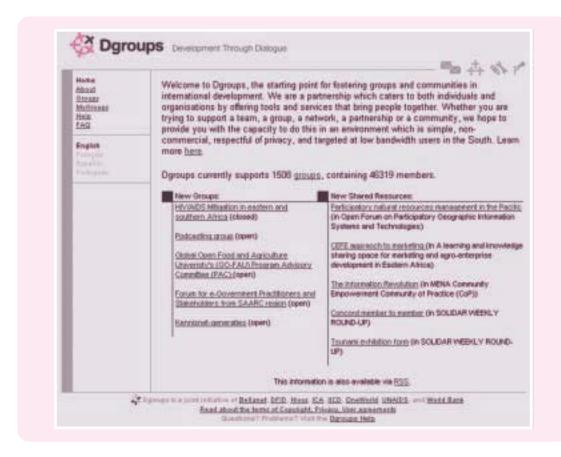
- "I liked the sympathy and appreciated the ideas."
- A diversity of contributors favors a successful outcome.



- Clear specification of the problem is essential; doing this is half the work of identifying potentially useful solutions.
- "I might use it [the Peer Assist method] again in technical meetings."

#### After Action Review of Dgroups

To evaluate the WIG Dgroup, an e-mail-based discussion space set up several months earlier by Bellanet, an hour-long After Action Review was conducted. The purpose of conducting the After Action Review was twofold—first, to find out how the Dgroup could be more effective in strengthening the WIG, and, second, to introduce this tool as a learning process.



The After Action Review consisted of a plenary discussion focused on several simple questions: What is the purpose of the Dgroup? What has actually happened so far regarding its use? What has worked well and what has not? What should be done differently?

It was reported that Dgroup traffic was rather slow at first but that the discussion list is now well used. One director said he had been exploiting this channel to stimulate discussion of scientific issues. Other uses by Dgroup members include sharing scientific reports and articles and circulating tables of contents of journals.

Many aspects of e-forum operation were discussed, with participants particularly interested in Dgroup etiquette and procedures that promote efficiency. A clear message emerging from the discussion was that the Dgroup is extremely useful but that users need guidance and practical advice on how to make the most of this information service.



#### All ears on regional needs

Petr Kosina is wheat training coordinator and joined CIMMYT in November 2004.

"So far, I know only those scientists based at headquarters. Now I've had a chance to hear the opinions [about training needs] of those who come from the regions. In this particular aspect, my expectation is absolutely fulfilled, because they were interested in the discussion and they expressed their ideas. So that's perfect. The problem for me is that their ideas were totally different from what I expected! I now need more time for one-on-one discussions on specific topics, because several of the staff raised issues from their regions which have to be addressed."

#### Closing the circle and participant evaluations

At the close of WIG meeting on Friday afternoon, participants were asked to reflect on the 2-1/2 days of sessions and the KS techniques it had employed. The task took two forms: the final closing of the circle and filling out a four-page questionnaire.

In the final few minutes of plenary, one participant noted that the ultimate litmus test of the meeting will be concrete follow-up of the action plans. Others mentioned that, while the discussion had been excellent, it might have been better to give the meeting a narrower focus.

The written evaluations, by 32 of the 36 CIMMYT staff in attendance, show that their overall reaction to the design and implementation of the WIG meeting was positive. On a scale of 1 to 5, where 1 signifies poor and 5 excellent, participants deemed the meeting "good," with an average rating of 3.9.

On the whole, most participants felt the meetings' objectives were accomplished, the average score for all three wheat-related objectives being 3.7. Achievement of the team-building objective got the highest score: 4.0. This is fully consistent with participants' comments, which point to the importance of face-to-face meetings, improved communication, and enhanced team spirit.

On the down side, the evaluation results indicated that many participants felt there was too little time available to deal adequately with the entire meeting agenda, and they would have appreciated having more clear recommendations formulated.

In the evaluation participants were also asked about the usefulness of the various KS techniques used—to CIMMYT and to themselves personally. The After Action Review method, applied to evaluate the WIG Dgroup, proved to be the most popular.



## Working Together to Make a Difference: CIFOR's Annual Meeting

"We're going to give you space and an opportunity to talk about the things that really concern you, that you are worried about, that excite you," explains David Kaimowitz, CIFOR's director general in his welcoming speech to over 100 people who have gathered in the lobby at center headquarters in Bogor, Indonesia. Gone is the formality of traditional annual meetings, with their large plenaries and rigid agendas. This week the rhetoric of institutional democracy will become a reality.

During the last 2 years, many CIFOR staff have commented that the institution has become increasingly compartmentalized, with scientists working mainly within the orbit of their own programs. At the same time, CIFOR's process of decentralization has made it more difficult for staff to have face-to-face discussions.

In an effort to change all that, a small organizing committee, set up by the Center's Program Advisory Group, drew up plans for introducing KS approaches into the annual meeting, with support from the KS Project. The objectives set for the meeting, entitled "Working Together to Make a Difference," were to:

- 1. Create shared understandings of CIFOR's future direction, vision, and values.
- 2. Provide a forum for program discussions and planning.
- 3. Share knowledge and increase understanding of CIFOR's global programs and regional strategies and the linkages, overlaps, and issues.
  - 4. Provide forums for discussions and exchange on ongoing and emerging scientific issues.
  - 5. Mix, mingle, and have fun.

As the participants decide which of various workshops to head for, Michael Hailu, director of CIFOR's Information Services Group, reflects on his ambitions for the week. "We want people to feel as though they're re-engaging with the organization and each other," he says. In short, this 5-day meeting should provide a serious dose of institutional Viagra.

#### A Knowledge Fair focused on collaborative research

On Monday a Knowledge Fair features workshops, presentations, poster displays, and videos relating to research conducted by CIFOR and its partners. Parallel workshops in the morning cover three topics: the center's draft Latin American strategy, the role and potential of forests for improving livelihoods, and forests and water. During a short break after the workshops, everyone is encouraged to visit the information booths in the Knowledge Market Place. This is followed by three short presentations, again held in parallel, exploring staff recruitment, illegal logging in Cameroon, and forest conflicts in West Africa. The afternoon follows a similar pattern, with workshops and presentations, before culminating in a 2-hour workshop on CIFOR's partnerships.

So is the first day a success? There is certainly a sense of anticipation, good humor, and bonhomie. People who haven't seen each other for months, and sometimes years, have an opportunity to meet again. According to a brief straw poll, taken during lunch and







#### Not on the stuffy side

Reflecting on the first day of CIFOR's annual meeting, Doris Capistrano, director of the Governance Program, believes the meeting has got off to an excellent start. "You can just feel the energy," she says. Doris has had considerable experience of innovative meetings with the Ford Foundation, which uses theater, mime, and other techniques at staff meetings. So this isn't a new process to her. "I think this is a good way for CIFOR to go," she says. "Normally, respectable research centers tend to be on the stuffy side."

on chance meetings in corridors, the workshops have provided— for some, at least— a new perspective on CIFOR's broad body of research work.

It is clear during the opening day that there is a significant "bottom-up" element to the meeting, with the intellectual agenda being set not so much by the management team as by the staff themselves. In the weeks and months leading up to the annual meeting, individuals took it upon themselves to promote ideas and agreed to run workshops or give presentations.

The day ends with a candle-lit cocktail party and dinner under the broad canopy of trees outside the main building. Participants are treated to traditional music and video reflections of the day's events. Fortunately, it doesn't rain. This is presumably because CIFOR used the services of a "rain man," whose charges to keep rain away from Bogor for the evening were a small fraction of what it would have cost to hire a marquee.

#### An Open Space session: Biodiversity and much more

Tuesday is the first of 2 days devoted to Open Space. David Kaimowitz sets the ball rolling by saying that today's the day when there are no limits in terms of topics to be discussed.

#### **Open Space snapshots**

By Wednesday most participants have had enough time to pass provisional judgment on what amounts to a new way of doing things for CIFOR. During the day it becomes clear that most people found the Open Space sessions of the previous day enjoyable and rewarding, although some have reservations about the process. Here are a couple of snapshots, garnered before the day's work begins.

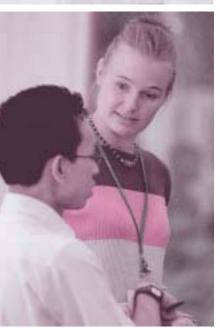
Bruce Campbell, director of the Livelihoods Program, says he thinks it's been a nice exercise to get a whole bunch of issues on the table, but many of these issues have been discussed for years at CIFOR without being resolved. "We need to move forward and sort these issues out once and for all," he says. "You need more structure if you're going to make strategic progress," he concludes.

In contrast, Dino Satrio of the Information Services Group is wholeheartedly enthusiastic. Dino says she appreciated the Open Space format, as it meant that people were able to split up into small groups. "We had the confidence to speak up and join in discussions, something that doesn't happen in large formal meetings," she says.









The facilitator, Allison Hewlitt of Bellanet International Secretariat, then takes over. She begins by asking everyone to say good morning in their own language; a total of more than 15 are represented, ranging from Japanese to Korean, Finish to Wolof, Javanese to Ethiopian. This emphasizes the international nature of the gathering. She tells the group to visualize the time when working together has made a difference. She invites everyone to look behind the faces in the room and think of all the stories behind the faces and the knowledge they have to share.

Then, she explains how Open Space works . During the next 10 minutes, 27 people come up with 29 separate topics, ranging from the managerial to the scientific, from the broad and philosophical to the very specific.

There are two sessions before lunch and two after, with an hour allocated for each. For each session there is a choice of at least five different topics. While some groups attract relatively few people, others attract more than 30.

The meeting on biodiversity research, to take just one example, is initiated by the young Norwegian researcher Piia Koponen and attracts 18 people, including many of the senior staff and the director general. Robert Nasi provides a historical overview of CIFOR's biodiversity research, and everyone is invited to say why they have decided to attend this meeting. David Kaimowitz outlines five main areas of biodiversity research in which CIFOR has worked, suggesting where the organization has succeeded, and where it hasn't.

Afterwards, Ravi Prabhu, acting regional director for eastern and southern Africa, suggests that the session was useful. "The meeting helped us develop a framework for people working on biodiversity and created synergy between different researchers," he says. "The meeting was so interesting that we're having a follow-up tomorrow."

In the afternoon participants reconvene for a brief plenary session, facilitated by Simone Staiger of CIAT – "to close the circle." Already, the windows of the Amazon room are plastered with reports from a dozen groups.

#### Closing reflections

Yurdi Yasmi says that he has found the day very fruitful and much preferred the format of this meeting to previous years. "I felt I could share issues," he says. "But my concern is how we will follow up and make sure our issues are addressed."

Participants reconvene on Wednesday morning in the Amazon room. Jennifer Crocker, head of Human Resources, "opens the circle," explaining the order of the day. First, everyone takes time to read the 27 discussion reports that have been collated overnight by Allison and Simone. Then, Jennifer invites comments from the floor. Many are concerned with the issue of interprogram cooperation and integration—or the lack of it.



The first to speak is Robert Nasi. "I enjoyed the discussions and participatory agenda-setting yesterday," he says, "but the programs still seem to be working in a parallel way." He would like to attend, not only his own program meeting on Friday, but other program meetings as well, but this won't be possible, as all three meet at the same time.

William Sunderlin and Carol Colfer point out that they have managed to

establish good relationships with people from other programs in a spontaneous way, through discussions over meals, during meetings in corridors, and at social events. "So let's be individually more proactive," suggests Carol. However, William suggests that CIFOR needs a structured system of communication between the programs as well.

In the next stage of this Open Space session, Jennifer invites people to come forward to initiate the morning's discussions, which end up dealing with four topics.

The one that attracts the largest number of people—"Does CIFOR need a new strategy?"—is instigated by Brian Belcher. One of the attendees (the author of this account of the event) reckons he learns more about the nature of CIFOR as an organization during this vigorous, articulate, and intelligent discussion than he has through face-to-face encounters with individual scientists during 5 years' of consultancy work.

Lunch is followed by the closing session in the Amazon room. For some reason, many national staff who turned up in the morning are absent, and there are many empty seats. Perhaps those who do not come are simply attending to administrative and other business, which they feel they can no longer neglect.

The four initiators of the morning discussions briefly report back. Allison suggests that everyone spend a few moments reflecting on what they have learned during the morning. She passes round the microphone, inviting anyone who wishes to say something.

Carol Colfer says she usually hates annual meetings but has enjoyed this one—so far. Patricia Shanley feels that the innovative introductions this year have much to commend them, but she believes that next year there should be a mix of the conventional and the innovative.

#### Peer Assist and closure

Peer Assist, as explained on page 7, brings together a small group of individuals to share their experiences, insights, and knowledge to help one person solve a specific problem.

Only 40 participants reconvene in the Amazon room on Thursday morning. Allison explains the nature and purpose of the Peer Assist process. Five CIFOR staff will explore their problems under the heading "Highlighting and Addressing Regional and Global Issues."





#### Young scientists' reflections

After the morning session there is time to reflect on the Knowledge Fair, Open Space, and Peer Assist. Here are the views of some of the young scientists who have recently joined CIFOR.

This is the first time that Mathurin Zida, a soil scientist who works on CIFOR's Dry Forests Program in Burkina Faso, has visited CIFOR headquarters in Indonesia. "It was very important for me to find out about the research carried out by other scientists," he says. "I learned a lot during the Knowledge Fair on Monday and gained a better global vision about what CIFOR is doing."

Marieke Sandker, a young Dutch scientist, is spending 2 months in Bogor before setting off for Cameroon. She liked the Open Space sessions "I liked the way people could put things on the table and discuss them in a very open way," she says

Another young Dutch scientist is particularly impressed by the superb organization of the meeting and the way in which the "red shirts"—the staff responsible for the practical issues—have gone about their business so efficiently.



Reactions to the process are positive. Daniel Tiveau—his question was "How do you live up to the expectations of national partners?"—says that, although his group didn't come up with anything he hadn't already considered, he liked the exercise. "I would like to try this process with a scientific problem next time," he says.

Violeta Colan, CIFOR's only staff member in Peru, says she received many interesting suggestions about her problem, which is how to tap into the experiences and knowledge of colleagues when working in isolation.

Allison then throws the discussion open to the floor. Daniel Murdiyarso of the Environment Program says he found the Peer Assist process very exciting and thinks that this may at times be a better way of solving problems than through one-to-one conversations.

Doug Sheil, one of the senior scientists, feels that it has been good to provide space for people to choose topics and air their views. However, he wonders whether there hasn't been too much talk about bureaucratic and managerial issues, and too little about science.

Immediately after lunch, David Kaimowitz, Doris Capistrano, Norman MacDonald, Ravi Prabhu, and consultant Liza Gonzalez answer questions about the forthcoming External Program and Management Review (EPMR). Organized as a "Chat Show," the meeting is well attended and expertly hosted by CIFOR media specialist Greg Clough. The wrap-up session, introduced by Michael Hailu, consists of a short video of the week, a slide show, and a session of "Speed Dating," at which everyone has 10 minutes to talk to as many people as possible on what they liked (or didn't) about the last 4 days.



David Kaimowitz gives a brief address before banging the gong to wind up the day's meeting. "This week, there has been big progress on a lot of little things," says David, "and a little progress on a few big things." The intention now, says David, is to provide leadership that will help open up more space—"so that you can all contribute to the sum of what we're doing."

#### **Program meetings and Fiesta Friday**

The final day is devoted to program meetings. One program takes advantage of the facilitation skills of Michael Hailu. Michael attended a workshop on group facilitation held at Rome in February 2005 and organized by the KS Project and ILAC Initiative.

The meetings are followed by *Fiesta Friday*, a brilliant dinner dance with a Latin American theme. The CIFOR sports hall has been wonderfully transformed for the occasion. It doesn't rain, which means the rain man has justified his fee again.

#### Evaluating the annual meeting

At the end of the fourth and fifth days of the meeting, participants were asked to complete an evaluation form, and a total of 72 did so. Most responded positively to the meeting, giving it an average rating of 4.1 on a scale of 1 to 5, with 5 indicating excellent.



With respect to meeting objectives, participants noted that it had

contributed to a better understanding of CIFOR's global programs and regional strategies. They especially appreciated the opportunities, open to all staff, for engaging in discussion and knowledge sharing. Some felt, though, that less progress was achieved in reaching a shared understanding of the center's future direction, vision, and values. For almost all participants, the "mix, mingle, and have fun" objective was definitively achieved.

When asked to comment specifically on the KS approaches, most participants said they found the Open Space sessions to be innovative and useful, and they expressed interest in using this approach in the future. Responses to the Knowledge Fair and Peer Assist were similarly positive, with some mentioning that they would like to apply the latter method to scientific issues. Participants reserved especially high praise, though, for the informative session, using the Chat-Show method described above, on CIFOR's upcoming EPMR.



To improve future annual gatherings, participants suggested that (1) program meetings should be scheduled in such a way as to allow more discussion of cross-program issues, (2) more time should be allowed for in-depth discussions, and (3) there should be a sharper focus on action planning.

#### Skills and Resources to Enhance Knowledge Sharing

Through the pilot initiatives presented in this report, the KS Project has explored the potential of major meetings as entry points for promoting KS in the CGIAR. But such work must be accompanied by other activities as well, as described below, if we are to achieve the behavioral and cultural changes needed for making KS the norm rather than the exception.

#### Training in facilitation skills

Facilitation skills are essential for CGIAR staff, not only for organizing better meetings, but also for working more effectively with partners in teams involving people from different organizations, backgrounds, disciplines, nationalities, and cultures. For that reason the KS Project joined forces with the CGIAR Institutional Learning and Change (ILAC) Initiative to offer training on the facilitation of group decision-making. The objective of the course was to build participants' facilitation skills for conducting meetings, working with teams, managing conflict, and building consensus.

The training proved extremely effective. Three months after the course, over half of participants had used their new skills to facilitate work-related meetings and had shared the skills with colleagues. One participant commented as follows:

Using the techniques I learned at the course, I facilitated a very important 2-day meeting of CIFOR's senior management team on strategic staffing. I introduced the "gradient of agreement," which was used throughout the meeting before making decisions. It was a highly productive and satisfactory meeting.

Given the highly positive results of the first course, a second course on facilitation skills was held in November 2005.

#### Fostering KS through human resource policies and practices

Management systems and practices may or may not be conducive to introducing or mainstreaming KS. To gain a better knowledge of this issue and to identify key areas for future intervention, the KS Project and ILAC Initiative carried out a joint study on the role of human resources policies and practices in fostering KS and organizational learning. The study examined six CGIAR centers as well as six other organizations that are regarded as leaders in this area.\*

All of the organizations studied, including the CGIAR centers, are promoting KS and organizational learning to some extent, generally in the context of broader organizational change efforts. While some of the organizations studied have pursued comprehensive, integrated approaches, most have resorted to small-scale efforts, seeking incremental changes. It is sometimes assumed that CGIAR centers are far behind other research and development organizations in KS and organizational learning. Our findings indicate, though, that while most of the centers covered in the study lack comprehensive strategies, some are actively pursuing promising initiatives, from which others can learn.

For further information on the study, see Krista Baldini. The Role of Human Resources Policies and Practices in fostering Knowledge Sharing and Organizational Learning. ILAC Brief 11. IPGRI, Rome (2005).



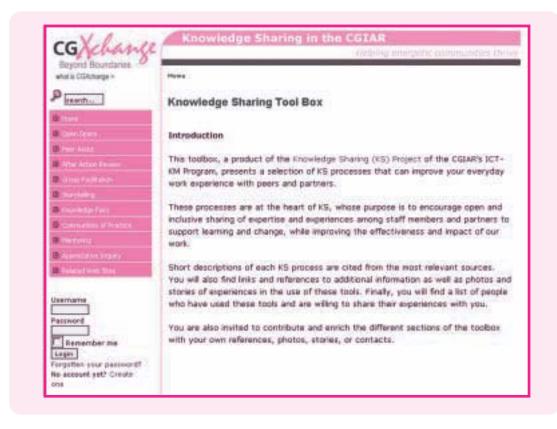
Three key factors were identified that influence the success of efforts to foster change through KS sharing and organizational learning: (1) public support for such initiatives from top leaders, (2) an explicit recognition of the way in which the organization's business strategies are reinforced by KS and organizational learning, and (3) effective policies and practices for internal communication that support KS and organizational learning.

#### **KS Toolbox**

A "toolbox" for KS practitioners in the CGIAR, available on the Web, presents a selection of KS methods and approaches.

Short descriptions of each tool are cited from the most relevant sources, and step-by-step guides are provided for their use. The toolbox also provides links and references to more information, as well as stories from experiences in the use of these tools. Finally, it offers a list of possible contacts from peers who have used the tools and are willing to share their experiences.

Users of the toolbox will be encouraged to enrich the content by contributing their own references, stories and contacts.





#### **Lessons Learned and Future Directions**

The four pilot initiatives developed under the KS Project are based on the hypothesis that high-profile events can be an effective entry point for promoting the adoption of alternative KS approaches. The experience of four CGIAR centers seems to bear out this hypothesis. Through these events large numbers of staff gained direct experience with KS, and when asked to evaluate that experience, the results were largely positive. All the meetings made significant progress toward their individual objectives, and many staff expressed enthusiasm about the new style of conducting meetings.

Even so, it is also clear from the experiences presented in this report that our organization and planning of such events can be improved. Toward this end we began a process of identifying lessons learned from the pilot initiatives, which culminated in a 3-day workshop in September 2005 encompassing all four pilot initiatives.

Some of the lessons we have drawn from the experience so far may seem rather obvious. For example, the CIAT and CIMMYT pilots underscore the importance of involving as many staff as possible in planning the event. We thought we knew that, but evidently we didn't put it into practice very well.

At CIAT, while the coordination team held extensive discussions with management and staff at headquarters, it consulted only the regional coordinators to gauge the views of the center's numerous outposted staff. In reflecting on the Open Space session, we realized that many of the outposted staff didn't have enough information about the research-for-development challenges to participate effectively in planning their operationalization, a key objective of the meeting. Broader consultation with outposted staff may have brought this obstacle to light at an earlier stage and prompted us to organize the Open Space session differently.

In the course of such consultations, it is important to remain alert to individuals and teams who show special interest and are prepared to invest time in experimenting with new ways of working with groups. These teams are potential KS "champions," and their support is vital for organizing and conducting individual events and for achieving acceptance of KS approaches. Time and resources should be devoted to building their confidence and capacity.

That approach was especially successful at CIFOR, where a champion (Fionna Douglas, the center's program development coordinator) was identified to organize the event. As a result, the planning process was more inclusive, and CIFOR was able to build a strong team around its pilot initiative. Particularly noteworthy was the fact that national staff played an active role and took ownership of many aspects of the event, contributing to extremely high staff participation.

Of course, we will never achieve flawless execution of KS events. And even if we could, we must bear in mind that these events are only part of an integrated KS strategy. Our experience shows that they arouse considerable interest in KS among large numbers of staff. But to achieve wide use of KS approaches in center activities, staff will need to acquire new skills, gain reliable sources of continuing support, and perceive clear incentives to pursue their interest in KS. Hence the importance of the above-mentioned facilitation training and the work on human resources policies and practices.



#### A Pilot Project on Knowledge Sharing in Research

IWMI has embarked on a pilot project that focuses on KS in research. According to Sanjini de Silva, IWMI's head of communication and knowledge sharing, the project aims to enhance the impact of agricultural research by helping bridge the gap between scientists and the end-users of research results." The idea, she explains, is partly to make the research process more efficient by improving KS between researchers. But the main focus is on increasing the effectiveness and impact of research by enhancing interaction between all stakeholders.



The pilot project is part of a comprehensive KS strategy for IWMI and the CGIAR's Water and Food Challenge Program (CPWF), which IWMI coordinates. Through the project, IWMI is identifying, evaluating, and documenting innovative KS and communications methods that scientists and their partners can use in research.

To plan the launch of this project, a coordination team (Sanjini de Silva and Allison Hewlitt of Bellanet) met to organize an inception workshop. Supported by the KS Project, the workshop was designed to help participants reach a shared understanding of KS in research and draft concept notes for projects to integrate KS approaches and tools into current research activities.

Held at Colombo in June 2005, the workshop brought together17 people—including 10 "focal points" from IWMI and CPWF projects in Africa, Asia, and Latin America. The event was facilitated by Allison Hewlitt, together with Simone Staiger of CIAT. They employed a range of KS approaches, including:

- A Knowledge Fair, in which participants shared experiences and activities involving KS.
- Open Space sessions on a range of ideas—from developing a culture of listening to postproject sustainability—for enhancing KS between researchers and users.
- A Peer Assist process, based on issues raised by participants.
- Outcome Mapping to identify challenges and progress indicators.
- An After Action Review at the end of the workshop to gather constructive feedback and capture lessons learned.

In an evaluation of the workshop, participants judged the Knowledge Fair and Outcome Mapping exercise to be the most important and interesting aspects of the event. In addition, they said they were committed to applying KS approaches (the Peer Assist method, for example) to strengthen relationships within research teams and with partners.



It remains to be seen how widespread application of KS approaches can affect a center's culture and performance in achieving its objectives, or in improving the performance of the CGIAR as a whole—the ultimate goal of the KS Project. However, based on the experience of the KS Project and the experience of many other research and development organizations around the world, we feel confident that more dynamic communication and improved sharing of knowledge will lead to better decisions and more effective teamwork, resulting in better organizational performance.



For future KS initiatives in the CGIAR, it is important for each of the centers involved to devise their own action plans for promoting KS and for further developing in-house capacity to implement those plans. Another crucial step is to foster development of the emerging community of KS practitioners in the CGIAR, expanding it to involve professionals from all areas of the centers' work, including research, capacity strengthening, support, and management.

Finally, and perhaps most important, we need to begin applying KS approaches in our increasingly complex partnerships with a growing array of national, international, and local partners. The most important impacts of KS are likely to come from its beneficial effects on collaborative arrangements. Recent experience at IWMI and CIAT in sharing KS

approaches with research partners is quite promising. As center staff realize the value of those approaches in facilitating research and development collaboration, we believe they will become more committed to incorporating them into the day-to-day activities of their centers and in the CGIAR generally. Once KS approaches become normal practice in our organizations, they will have a profound effect on the way we contribute to learning and innovation through research partnerships.









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Design and

Layout: Julio César Martínez and Oscar Idárraga

Imágenes Gráficas S.A., Cali, Colombia Printing:

