

CIAT's Knowledge-Sharing Week

A Pioneering Case of Knowledge Sharing in the CGIAR

Background

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

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

To respond more effectively to the changing needs of clients and partners, CIAT and other centers need to do a better job of managing and sharing the vast amount of scientific and other knowledge 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 our scientists.

The CGIAR took an important step toward improved knowledge management by creating the ICT-KM Program. Its strategic plan envisions "a CGIAR without boundaries, an internationally distributed, unified, and open knowledge organization." As part of its effort to realize that vision, the program embarked on a project designed to foment a knowledge sharing (KS) culture within the CGIAR. Coordinated by CIAT, the project has implemented an exciting program of pilot initiatives in four centers, together with complementary studies and capacity building activities.

This report documents the first of four pilot initiatives carried out by the KS Project during 2004-2005. It 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 CIAT and other CGIAR center staff who have participated in KS Project activities, with special mention of the coordination teams of the four pilot initiatives. The success of the pilots so far has been 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.

Entry Points 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 orchestrate research for development across many disciplines and through partnerships with each other and with myriad other organizations – small and large, public and private.

Major meetings of scientists and other professionals are an essential tool by which CGIAR centers plan, monitor, evaluate, and fine-tune research projects and programs. Yet, as centers have decentralized their operations, staging such meetings has become more costly, in terms of both time and money. Outposted staff typically fly in to headquarters from all over the world. The two-way travel time may be as much as 5 days. It is invariably a period of low productivity, despite the best intentions of laptop-toting scientists.

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 may lie in using these events as occasions for sharing knowledge more effectively. The idea is to move beyond mere exchanges of 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.

Even with meticulously planned agendas, large-scale meetings, such as annual work reviews and meetings of boards of trustees, sometimes go awry. Dissatisfied participants may resent the outcome, seeing the event as an inefficient use of resources or, worse, a total waste of their time. To ensure that the resources invested in such big-ticket meetings benefit both individual participants and the institution as a whole, it is essential to get the objectives, agenda, format, and facilitation right. And that’s where an effective knowledge-sharing (KS) approach can help.

To demonstrate exactly how key events can serve as entry points for KS, the KS Project of the CGIAR’s ICT-KM Program is planning and supporting four pilot initiatives in as many centers during 2004-2005, in close collaboration with center staff. The first pilot activity, called “CIAT’s

Knowledge Sharing Week: Dynamic Communication for Change,” took place from 29 November to 4 December 2004. The other three pilot initiatives are being developed at CIMMYT in Mexico, CIFOR in Indonesia, and IWMI in Sri Lanka.

This document provides a first-hand account of the CIAT pilot, describing how it was planned and implemented and with what results, from the multiple viewpoints of center management and staff.

CIAT: A Willing Guinea Pig

Like most other CGIAR centers, CIAT has a long tradition of annual meetings of professional staff. The format has typically centered 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, however, many feel the time spent in annual staff meetings isn't used as well as it could be (see box). Too many hours, they say, are gobbled up by formal presentations, with little in-depth discussion of “burning issues.” There are few opportunities for people to get to know each other and establish the collegial relationships that are essential for creative scientific collaboration. Moreover, meeting results have seldom been documented, and follow-up action has been limited.

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. The KS Project also wanted to contribute to the wider goal of improving KS across the entire CGIAR.

Concerns about CIAT's annual meeting

Research Director Douglas Pachico recalls the recent history of the CIAT 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.”

Forming a Coordination Team and Setting Objectives

A five-member team, with strong skills in information management, communications, and monitoring and evaluation was established to work with CIAT management in planning and

carrying out the 2004 meeting.

The coordination team for CIAT's 2004 Knowledge Sharing Week, led by the Center's research director and supported by a consultant from Bellanet, consisted of a mix of CIAT information, communications, and KS specialists.

- Douglas Pachico, Director of Research
- Edith Hesse, Head, Information and Capacity Strengthening (InforCap) Unit
- Nathan Russell, Head, Communications Unit, and Manager, Information and Communications for Rural Communities (InforCom) Project
- Douglas Horton, Coordinator, CGIAR Knowledge Management and Sharing Project
- Simone Staiger, Web Publishing Coordinator
- Allison Hewlitt, knowledge-sharing specialist, meeting facilitator, and Program Officer, Bellanet International Secretariat, Ottawa, Canada. (Bellanet promotes and facilitates collaboration within the international community through its expertise in information and communications technologies, organizational learning, and knowledge sharing.)

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. Over several days, the meeting's objectives, agenda, and logistics were sharpened, with the following results:

- 1. Develop a shared understanding of the three CIAT Development Challenges and contribute to their effective operationalization.**

In February 2003, CIAT began a process of reflection to identify a small number of “development challenges,” that is, major issues on which the Center might concentrate its scientific competencies. The aim was to create a more coherent research program under the strategic plan for 2001-2010 and reach consensus on priorities for fund raising. In the end three challenges were selected: enhancing and sharing the benefits of agrobiodiversity; enhancing rural innovation; and overcoming agroecosystem degradation. KS Week 2004 was seen as an opportunity to ensure CIAT staff had a common understanding of these development challenges and to explore options for incorporating this new axis in the Center's research efforts, the other two organizational axes being CIAT's project structure and regional operations (see box).

- 2. Enhance the integration of headquarters and regional staff and activities.**

In 2004 about 38 percent of CIAT's 117 internationally recruited staff were located outside of Colombia, which hosts CIAT headquarters. In total outposted staff are located in 20 countries. Issues of integration are bound to arise with such a geographically dispersed staff, especially given the fact that most of the 15 research projects comprising CIAT's program of work cut across regional boundaries.

- 3. Promote effective work planning on the part of project teams and collaborators.**

This is a variation on what has traditionally been a key objective of CIAT annual staff meetings, namely planning. In the case of KS Week, emphasis was placed on improving the planning process itself rather than producing actual work plans.

4. **Demonstrate how KS techniques can help us.**

CIAT and the KS Project wished to ensure that staff reflected not only on the CIAT-specific content and outcomes of the 2004 staff meeting but also on the effectiveness and relevance of the redesigned format and process. These observations should prove useful in the planning of future meetings at CIAT and other centers.

Working together in 3D

Rod Lefroy is an upland farming systems specialist and CIAT's regional coordinator for Asia, based in Vientiane, Lao PDR. He commented just before the start of KS Week:

“CIAT has a three-dimensional structure, organized around projects, regions, and thematic challenges. The addition of this extra new layer – the development challenges – creates both complexity and opportunity. It's hard right now to see how everything will fit together. While we won't come up with *the* solution at this year's staff meeting, I do hope we can all explore various ways of working together. Since some projects are driven largely from headquarters, and others within the regions, these working relationships will need to vary according to the nature of the project.”

A Knowledge-Sharing Approach

Meeting formats and communications techniques used in past years at CIAT have been rather conventional. For example, PowerPoint presentations were given during plenary sessions in the main auditorium or, for breakout or individual project sessions, in smaller meeting rooms. While these approaches weren't abandoned during the 2004 KS Week, the coordination team elected to make use of four alternative techniques for about half of the total meeting time.

Open space (see box) is the most complex of the alternative knowledge-sharing strategies used during KS Week. It is a highly democratic method of group agenda setting, followed by small-group discussion, reporting, and preparation of action plans. It is predicated on the idea that follow-up action is more likely when individuals become engaged due to strong interest in the issue.

Peer assist is a method of collective problem solving between colleagues. Like the open-space technique, it is democratic in the sense that participants may offer advice or analysis as they see fit, on the basis of personal interest in the problem or prior experience with it. But those brave enough to present problems for analysis also benefit from collective wisdom, since problems are “rotated” from discussion group to discussion group.

A ***knowledge fair*** was organized in the form of a 5-hour-long exhibition of support services available within CIAT and of the activities 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 *barometer team* monitored KS Week activities as they unfolded, and recommended ways to make future meetings more effective. As such, its job was to conduct *after-action reviews*. The team consisted of five headquarters staff, four outposted staff, meeting facilitator Allison Hewlitt, and one other communications consultant.

In addition to these tools and methods, the coordination team set up a special section of the CIAT Web site dedicated to KS Week news. It also introduced an electronic system for scheduling and reporting on project and special-interest meetings, most of which took place the last 2 days of KS Week, the Friday and Saturday.

The sections that follow explain how some of the various tools and methods mentioned above were used during KS Week, what the outcomes were, and how CIAT staff reacted to them.

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.” Its action-oriented logistics boil down to six components:

- All topics participants wish to discuss get discussed.
- Key discussion points are collected in a report distributed to all participants.
- Topics are prioritized.
- Other related topics are linked to the priorities.
- An action plan is formulated.
- Participants take responsibility for follow-up.

Allison Hewlitt was the principal facilitator for CIAT's 2004 KS Week. She used the open-space technique to help participants address the first objective of the meeting, namely to reach a common understanding of CIAT's three 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.”

Hewlitt lists four simple rules or principles that govern the open space methodology. Perhaps “anti-rules” is a more apt term, since they are really tongue-in-cheek adages with an intentionally deterministic ring.

1. **When it starts, it starts.** You, the participant, can start a conversation or join a group whenever it suits you. It is up to you to participate when you feel most comfortable. The responsibility of ownership of the discussion is placed squarely on your and your fellow participants' shoulders.

2. **When it ends, it ends.** When you and other participants are no longer contributing or getting something out of the discussion, the session is over. There is no need to prolong it. If the discussion has produced useful results, fine. If not, that is your responsibility.
3. **Whoever comes are the right people.** You show up at a discussion group because of your individual interest in the selected topic. The rules of open space legitimize your personal choice. You are not obliged to attend a specific session – for example, one organized by your supervisor – for the sake of political correctness.
4. **Whatever happens is the only thing that could have.** With the open space methodology, there are no pre-ordained or expected outcomes of the discussions. What matters is that those who end up discussing a specific topic, and possibly deciding on some followup action, are those who are actually interested in and motivated by that topic.

The freedom of expression and movement promoted by these four principles leads participants to behave in one of two fashions. “Some act like bumblebees,” says Hewlitt. “They move from space to space, discussion to discussion, cross-pollinating their ideas, contributing where they can. Others act like butterflies, that is, social butterflies. They are sometimes perceived as unproductive, because they spend considerable time near the water cooler or coffee machine, chatting with others. But the open-space technique values butterfly behavior, acknowledging that it can be an effective means of sharing knowledge.”

The Gathering of the Clan: An Open-Space Session of New R&D Initiatives

On Monday morning, shortly after 8 a.m., staff gather in CIAT’s largest formal meeting room, the Kellogg Auditorium, named after US philanthropist and champion of breakfast cereals, Will Keith Kellogg. Two presentations by senior managers set the scene for KS Week and, in particular, for the 2 days of open space sessions that are to begin in an hour or so. The director of research gives an overview of the week’s work, including the four objectives to be addressed by what he calls the “gathering of the clan.” After introductions of new staff, the director general explains the origin, rationale, and current state of implementation of CIAT’s three development challenges. Each of the two speakers uses a conventional format for his presentation: an overhead projector in one case, a computer-slide projector in the other.

After the break the entire group moves to an expansive open-air setting: the covered patio that forms the northern side of the CIAT campus quadrangle. Flanked by the tall white-washed arches (*los arcos* in Spanish) that are the hallmark of the Center’s hacienda-style architecture, this open space has been designated the principal meeting area for the rest of the week – a place to share ideas in plenary, compose reports on laptop computers, and chat with colleagues over coffee.

With the 85-odd participants sitting side by side in a large ellipse, facilitator Hewlitt 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 small discussion group and arrange for the preparation of a short report.

The agenda-setting exercise captures 20 topics for discussion. These range from operational issues, such as impact assessment, to human resources needs, such as integrating national staff into development challenge work and building the necessary base of skills.

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. Although several topics overlap, participants are *not* encouraged to combine them. The rationale for allowing duplication is that having two brainstorming groups discuss a similar or identical topic may actually enrich the final set of ideas or proposals on that topic. 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. Two similar topics, related to management of the development challenges, are combined to form the number 1 priority.

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? When does the work start and when does it end? What resources (people and money) are needed?

After the meetings, a rapporteur from each group records the action plan on a computer set up in *los arcos* and, in the afternoon, presents the plan in plenary. The plans vary in their level of detail. Some specify time frames and the resources needed; others are more general.

During the closing plenary, participants comment on the extent to which the 2 days of open space meetings have contributed or not to operationalizing the three development challenges. While comments are mixed, there is a recurring message: Despite the progress made in the form of action plans on seven themes, there is still considerable confusion on how CIAT's R&D can and should be integrated under the three development challenges. Here is a selection of reflections – some paraphrased, some verbatim (or nearly so) – on the open-space discussions:

- The sessions were efficient in the sense that the intended action plans were all ready by the end of the second day as planned.
- It was a “nice surprise” to discover other like-minded staff members who may be potential partners in working on the development challenges.
- Participants discussed what they “could do” or may want to do. But, with the open space method, they didn’t discuss what they “should do” to operationalize the development challenges.
- “I’m happy we’ve made advances in integrating the development challenges with the CIAT projects.”
- The diversity within the CIAT staff is a source of strength, not conflict.
- Although the important issue of HIV/AIDS was mentioned, it was not discussed in any detail.
- Holding the plenaries outdoors under the arches was a very positive change.
- Change requires participation. The open space sessions provided for a good experience in that regard.
- To fully translate a wish list into concrete action plans, more time is needed.
- 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 appreciated the experimental, novel approach.”
- “I had wanted to put meat on the development challenges, but we haven’t done that.”
- “I don’t see how the action plans will help to move implementation of the development challenges forward.”
- “It is impressive that priorities were reached so quickly. We now need to put our money where our mouth is.”
- The time allocated for setting priorities was very short and the method ad hoc. The real strength of the overall process was the CIAT scientists themselves.
- There needs to be much greater participation by nationally recruited staff. This would enrich the process.
- “This meeting so far has been much more productive than last year’s.”

During the closing, the director general acknowledges that further organizational work is needed to operationalize the development challenges. “If this is just a talk shop, then we’re wasting resources by having this meeting,” says Joachim Voss. “But I see real value in using the development challenges for collective action. We are committed to following up.”

In its discussion at the end of day 2, the barometer team recognizes that many CIAT staff still do not grasp the development challenges in sufficient detail to be able to design action plans for operationalization. “We should have done a better job of determining whether people understood the topic well enough to discuss it,” comments one member. This meshes with what one participant later writes on the evaluation questionnaire: “KS week did not provide sufficient background knowledge on the development challenges, hence precluded effective work planning.”

That view seems consistent with the fact that, among the stated objectives of KS Week, the one related to moving the development challenges forward received the lowest rating as regards the degree to which objectives had been achieved. It scored 2.80 on a scale of 0 to 5, compared with the average score of 3.44 for the objectives taken together and 3.7 for KS Week as a whole. And of 11 KS Week components, the day 1 and 2 sessions on the development challenges were ranked second last and dead last, respectively, by questionnaire respondents.

In addition to suggesting improvements to the open space process, the barometer team recommends that CIAT management involve more outposted staff in premeeting consultations, to gauge how well they understand the theme. It also recommends that management ensure greater consistency in its messages to staff since even the names of the development challenges, as used during the day 1 presentation, deviated from earlier usage.

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.

The Knowledge Fair on Research-Support Services

It is now day 3, Wednesday, and CIAT's support units have moved into the limelight. The Research Support Fair and Expo Agronatura showcase the work and services of numerous groups within CIAT: Finances, Human Resources, the Library, the Communications Unit, Information Systems, the Project Office, the Donor Relations Office, and the Gender and Diversity Program. Partner organizations with offices on the CIAT campus also set up information stands.

As people move from booth to booth along the outdoor walkways of the CIAT quadrangle, they are 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 is clear: 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. His firm, welcoming handshake says it all.

One senior staff member from Asia reports having an enormously productive tour of the stands. At the Information Systems stand staff help him solve a computer problem; at the Human Resources stand a contract is finalized; at the Finances stand, a financial difficulty is successfully resolved; and the Library group provides him with requested information. At the end of the week, participants rank the fair fourth out of 11 events for its usefulness to CIAT. It is tied with self-organized meetings and a session to inform staff about “reengineering” of business processes such as project management and research proposal development.

Another person comments: “Management should have had a booth too!”

But there's a glitch. A parallel event, running all day, monopolizes the time of more than 20 staff members who might otherwise have been available to visit the Research Support Fair. A consultant has flown in to introduce the group to a KS technique known as "appreciative inquiry" and to help researchers apply it to one of the development challenges, the enhancement of rural innovation. The idea is to build a shared vision of what this development challenge means and to investigate ways to meet it based on best practices and other assets already available within the organization.

The topic and format of the all-day meeting dovetail nicely with the goals of KS Week. And several participants later report that the workshop has been quite valuable. However, since the event has been organized outside the purview of the KS Week coordination team, it ends up competing with the Research Support Fair, as well as with the Question Time with the DG session later that afternoon.

The next day, the issue of scheduling conflicts preoccupies the barometer team. Besides firmly supporting the idea that the fair be repeated next year – and expanded to include a display by each of CIAT's 14 research projects – the team recommends that participation be maximized by avoiding the scheduling of major events concurrently. While the timing of the appreciative inquiry workshop has caused problems, the team nevertheless recognizes its value. Based on preliminary positive feedback from participants, it recommends the method be used again in future to "help clarify the vision of the other development challenges."

Peer Assists on Regional and Headquarters Integration

The peer assist sessions on day 4 turn out to be very popular among participants. However, attendance is down roughly 40 percent from day 1 to about 50 people, with outposted staff outnumbering their headquarters colleagues 2 to 1. Seven staff members, including the director of research, present practical problems to the overall group and then have the benefit of discussion and advice from a smaller group. Rotation of the peer-assist presentations from group to group expands the base of shared experience and knowledge.

Unlike the open-space process, which generates the meeting agenda on the spot, the peer assist sessions are organized in advance and focused on working relations between headquarters and the regions.

"I am going away satisfied on the issue I raised," Nathan Russell tells the plenary on Thursday morning. Russell is head of CIAT's InforCom Project, which seeks to strengthen KS in R&D organizations and information networks in the rural sector. "My question was how to build partnerships in the regions for those project areas in which CIAT has little experience."

In his summary, Russell highlights three key pieces of advice offered to him during the peer assist. First, major effort must go into analyzing opportunities with partners; CIAT must avoid the temptation to pursue every new project in which it is invited to participate. Second, regional staff, knowing their home turf, can offer practical advice on setting up local partnerships and

making sure other organizations have a clear idea of what CIAT has to offer. Third, transparency with partners prevents false or unrealistic expectations from being raised.

Here are the other six peer assist topics:

- The scaling up of technology diffusion to end users and intermediary partner organizations
- Filling gaps in skills needed to complete research when midproject personnel changes occur
- Handling complaints from staff who feel they have been excluded from the design of research proposals that fall within their area of expertise
- Reconciling differing institutional requirements and expectations when a researcher has a joint appointment between two CGIAR centers
- Finding a balance between collaborating efficiently on new projects with colleagues and carrying out an existing workload in a regional office, where logistical support is limited
- Balancing staffing within CIAT projects with donor preferences in order to maintain or expand regional activities

In the wrap-up discussion, plant breeder Steve Beebe, who has served as a facilitator for one of the peer assists, observes that these discussions, while addressing problems raised by individual staff members, also have institutional implications. “I found the process very useful.” In a similar vein, a member of the barometer team later remarks: “Some of the recommendations were often measures that the individual can’t implement alone. But at least they are now in the public domain. Three months down the line people can ask the director of research, ‘How’s it going on your issue related to the exclusion of key staff in proposal development?’”

In the participant evaluations at the end of the week, the peer assist exercise is ranked number 2 (among 11 KS events) for its usefulness for CIAT, tied with a meeting of the Professional Staff Association. (The number 1 event for questionnaire respondents is “question time with the DG”.) One respondent comments that the peer assist session “addressed real issues and provided a concrete way forward on themes.” Another suggested that holding peer assists at the beginning of the week would be a good way to get people talking.

Barometer Team Behind the Scenes

Three times during KS Week, the 11-member barometer team met for 45 minutes to an hour in a quiet room after the day’s proceedings. Their aim was to reflect on “what went right, what went wrong, and what might be improved.” Team members were specifically instructed by Hewlitt, who led the sessions, to focus on practical suggestions and to avoid wasting time either praising or blaming.

The 48 recommendations of the barometer team, some of which have already been mentioned, are closely tied to KS Week strengths and weaknesses directly observed by team members or reported to them by other participants. Here is a sampling of suggestions for the future:

- **Open space:** Allow more time to develop action plans. Use the open space methodology to discuss research topics of interest to staff or how projects fit within the Development Challenges. Use outdoor space when possible, but ensure that the speaker system works well. Identify ways to increase national staff participation during the week.
- **Knowledge fair:** Provide guidelines on booths to be sure they are “client-oriented”. Include ways to track fair participants (national or international, headquarters or regional).
- **Peer assist:** Advertise and market the session to increase participation. Keep the groups small (5 or 6 people) to improve participation. Ensure people understand that the suggestions or solutions help the peer assistee solve his or her problem; they should not be directed to someone else, such as a manager.
- **Barometer team:** Use a mix of people – national and international staff, some from the regions, some from headquarters – to meet three times during the week. (“Three times was enough – not too much and not too little.”)
- **Other events:** The barometer team reflected on all aspects of KS Week, not just the new KS methods that had never been used before. Other events and topics included the question-and-answer session with the director general, the presentations on work in three regions, the meeting of the professional staff association, the “business process reengineering” plenary, and issues such as the level of staff participation and conflicts in event schedules.
- **General recommendations:** The option of holding some annual staff meetings in the regions rather than at headquarters every year was raised several times during the week. The barometer team recommended that CIAT management further investigate this possibility. It also suggested that staff be given the opportunity to improve their presentation skills and that CIAT again use an external facilitator for next year’s staff meeting. Echoing the comments of many KS Week participants, a barometer team member noted that Hewlitt’s “external and neutral facilitation worked quite well.”

Thank God It’s Saturday! The Wrap-up Session

After a day of “self-organized” meetings (Friday) for project-related work, it is now day 6, the last day of KS Week. After an early morning meeting to review CIAT’s on-going “business process reengineering,” two key tasks remain for the overall group: to reflect on the week’s proceedings and to complete the evaluation questionnaire prepared by the coordination team.

The wrap-up session in *los arcos* is attended by about 50 people – about 60 percent of the total number of participants present at the outset, on day 1. The smaller number is partly due to a scheduling conflict: A group of 20 people, mostly outposted staff, has gone off on a bus tour of CIAT research sites, an event organized without the coordination team having been consulted. This second case of unintended competition among activities reinforces the barometer team’s

resolve to strongly recommend that hurdles to participation in future staff meetings be removed.

The ensuing discussion by participants, like a large-scale version of a barometer team meeting, covers many topics. Here is a selection of comments and suggestions (mostly paraphrasing). Bringing the group full circle in its deliberations, the topic that elicits the most discussion is that related to operationalizing the development challenges.

- We had the “heavy-duty” reflection on the three development challenges right at the beginning, on Monday and Tuesday. Maybe it would have been better to have a get-to-know-the-staff session first, to allow people to warm up to the bigger events.
- We came to the meeting thinking everyone was up to speed on the development challenges. This wasn’t correct. If we had to do it again, it would be good to ensure everyone is at the same level of understanding.
- The process of KS Week was excellent. But we now need to accelerate work on the development challenges so that everyone knows where they’re going.
- KS Week was a good opportunity for support staff to learn more about the development challenges. But support staff should have greater involvement in future.
- Because of conflicting events, some people couldn’t attend the question-and-answer session with the director general and the research support fair. The organizers should ensure there isn’t competition between events. However, if there are to be useful events, like the appreciative inquiry workshop, they should be open to other staff.
- The question-and-answer event with the DG could be repeated at a lower administrative level. There could be sessions in which national staff in individual projects or units get to question their managers.
- It was a fantastic week, but I was nostalgic for the presentations on CIAT projects that were made in previous years.
- Ensuring the involvement of hundreds of national staff in future poses some logistical difficulties. We need to figure out how to handle this participation. The issue of the language of presentations, which relates to the need for greater participation of nationally recruited staff, must be resolved as well.
- Even during the annual staff meetings, headquarters staff have certain tasks to perform. This distracts them from the main event. CIAT should consider holding the staff meetings outside of CIAT to ensure that headquarters staff aren’t continuously running off to their offices to do other things.
- The most important outcome of the week has been improved relationships among staff.
- The highly interactive nature of KS Week should be maintained in future.
- While I was a bit skeptical about the process – the “touchy feely stuff” – the result turned out to be “smart interaction.” What we will take away from this meeting are subtle things related to our interactions with one another.
- We’ve all been speaking openly even with a member of the Board of Trustees present. Two, three, or even four trustees should be invited to future staff meetings.

In response to this last comment, Board of Trustees member Yves Savidan, of France, says he has learned a lot about “how CIAT lives and progresses.... I will pass on the message that a couple of trustees should participate in future staff meetings.”

In his closing remarks, director general Joachim Voss alludes 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.”

The Last Word: Evaluations by Participants

At the end of the Saturday wrap-up session, participants are asked to fill out a survey form to evaluate the event and provide suggestions for future annual meetings and for improving KS generally at CIAT. This is the key evaluation tool used by the coordination team, a complement to the monitoring work of the barometer team.

Forty participants complete the evaluation forms on the spot. The low response is in part due to the fact that 20 staff members have gone on the field trip. In the week afterwards, another seven other participants complete and submit their evaluation forms, bringing the total number of respondents to 47. The analysis of the results by the coordination team comprises a written report, respondents’ answers to open-ended questions, and a series of graphs depicting how various aspects and events during KS Week were rated by participants.

The questionnaire asks respondents to rate various aspects of KS Week using a 5-point scale. And at the end of each section of the survey form, they are invited to provide comments or suggestions.

Most participants are quite positive about KS Week and feel the meeting has improved communication and relationships and demonstrated the value of KS techniques (see boxes). They feel that less progress has been made in operationalizing the development challenges, due in part to the complexity of the task and the varying degree of staff involvement in formulating the development challenges. 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 indicate that they have found the peer assist, the knowledge fair, and the open-space approaches useful. They also express interest in using them in the future. They express less interest in the on-line event planner and the meeting Web site.

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.”

Backstopping African institutions

Robin Buruchara, a CIAT plant pathologist based at Kawanda Agricultural Research Institute in Kampala, Uganda, coordinates the Pan-Africa Bean Research Alliance (PABRA).

“At past staff meetings, we have normally taken a week or so to exchange information on our research activities. We explain what we do on various projects and what we have to offer, as well as what our own needs are. This year the meeting is organized more around issues. For those of us in the regions, that will be a chance to harmonize the way we work together with headquarters. For example, on behalf of the African bean research network, we can look at how CIAT as a whole can improve its backstopping of national institutions in Africa.”

Here are key suggestions offered by participants for improving future annual meetings at CIAT:

- Balance the old and the new formulas (i.e., combine the exchange of scientific information with KS techniques)
- Sharpen meeting objectives
- Focus work on fewer topics
- Prepare better for certain exercises prior to the meeting
- Organize more comprehensive knowledge fairs that include research projects and regional programs.

Participants feel that KS approaches should be incorporated into CIAT’s projects. And as noted below, they believe special attention should be paid to involving nationally recruited staff members more effectively in CIAT’s KS activities.

In their responses, participants identify four main positive features of KS Week:

- The openness, transparency and positive environment that prevailed throughout the week, which allowed people to get to know one another and encouraged them to speak openly
- The quality of personal interactions, which helped build good working relations
- The fruitful exchange of ideas and interesting new ones that were generated
- The organization, management, and documentation of KS Week

Limitations of KS Week are also recorded by the respondents:

- Variable knowledge of the development challenges prior to the meeting
- Lack of closure and concrete outcomes, particularly on how to move forward with the development challenges
- Insufficient time and opportunity for in-depth discussion of scientific and programmatic issues
- Limited participation of nationally recruited staff members
- Too many parallel sessions that didn’t allow participants to attend all the sessions they would have liked to (in particular the Research Support Fair).

When asked what aspects of KS Week they found more useful than previous meeting weeks, participants respond that the communication and interaction were more effective than in previous years. They also appreciated not being confined to closed, dark rooms and PowerPoint presentations.

The main element of previous meetings that is considered more useful than KS Week is the exchange of scientific and technical information on work on progress, results, and impacts. It is suggested that some mechanism be found to facilitate the exchange of this type of information, but without returning to the previous format of nonstop presentations with limited discussion.