Institutional Knowledge Sharing in the CGIAR
ICT-KM Program Interventions One Year Later
Empowerment

KS Toolkit

Provide tools

KS evaluation study
KS workshop
KM4Dev involvement

Learn about KS approaches to empower people

KS strategies
CIPR Strat. Plan
A6M

Make high-level processes work inclusive

IRRI - Research data N&T

Take org. Processes work participatory

KS website
Worldfish - Storytelling

Research - Knowledge Dakar
Institutional Knowledge Sharing (IKS) Project, managed by CIAT, has focused on scaling up project activities in CGIAR Centers and Programs, with the aim of mainstreaming knowledge sharing (KS) principles and tools. The overall objective is to contribute to organizational development, and improve CGIAR effectiveness by promoting collaborative learning and innovation, and supporting effective use of KS approaches and tools throughout the CGIAR.

KS principles, methods, and tools can support our organizations’ development and change. They help us build internal capacity so that we can work, in even more effective ways, towards our mission and to sustain ourselves over the long term. That is:

- KS can help us recognize and deal with today’s complexities, while strengthening our skills and attitudes. It also supports organizational learning and evaluation processes.
- By incorporating KS tools and methods into strategic planning and change processes, our managers can promote involvement, buy-in, and follow-up action by both staff and stakeholders.
- Systematic KS can make organizational day-to-day business more effective and transparent.

The IKS Project supports activities in three strategic areas:

1. Capacity building, M&E, and learning.
2. Strategies and change management.
3. Problem solving and good practices.
Capacity building, M&E, and learning: Dealing with complexity to empower staff

KS workshops

- A workshop concept and design were developed, and two workshops held.
- We reached 13 CGIAR Centers and seven partner organizations, involving 80 participants.
- FAO took the lead for the second workshop.
- Seven participants are co-authoring an article on challenges and experiences in their areas of work at the time of the first workshop.
- A pool of facilitators and mentors is being built. Of the eight facilitators and/or mentors, four are former workshop participants.
Evaluation of Phase I and its conclusions

- KS activities for Phase I (2004–2006) were evaluated in six centers and the CGIAR Secretariat.
- KS approaches are crucial if we aim to build our work on the collective knowledge of our staff and research partners.
- When introducing KS, it is best to start small.
- KS enables us to pay attention to the way we interact, and to create spaces where people’s voices can be heard and their unintentionally suppressed talents harnessed.
- KS ensures continuity in institutional cultures while facilitating change processes.
- KS works best when applied simultaneously at both grass roots and leadership levels.
- Building capacity in KS pays off.

Involvement with KM4Dev community

- The visibility of the CGIAR was raised among practitioners of knowledge management (KM) for development.
- The Project guest-edited an issue of the KM4Dev Journal, on “KM in Latin America and the Caribbean.”
- The participation of two CGIAR staff members in the annual KM4Dev meeting was sponsored by the Project.
- The IKS Project leader participates in the KM4Dev community core group.
- We created a pool of practitioners and consultants knowledgeable about KS.

Strategies and change management: Promoting involvement in organizational change processes

CGIAR change process and stakeholder engagement

- Support was provided for the application of KS methods at the CGIAR’s AGM 2006, 2007, and 2008.
The Project advised on and facilitated consultation processes with stakeholders through blogs, face-to-face meetings, and other means. We facilitated CGIAR engagement with civil society organizations (CSOs).

**CIFOR pilot project**
- KS approaches were used to increase the participation of CIFOR’s staff and Board members in the Center’s strategic planning process.
- These approaches helped identify and address common issues and concerns.
- A framework was created to monitor and evaluate the implementation of the strategy.

**Problem solving and good practices: Making organizational processes more interactive and transparent**

**IRRI and the WorldFish Center pilot projects**
- The IRRI project produced a wiki cookbook of good practices for research data managers.
- The WorldFish Center produced a “storymercial” video targeted on donor and partner organizations and wrote up the production process for the KS Toolkit.

**KS Toolkit**
- This resource, in wiki format, targets professionals working in international development. It has been expanded and improved. A user community has been created and membership promoted, particularly through linkages with the KS Workshop. The Toolkit wiki currently contains 70 tools and methods for sharing knowledge, receives more than 10,000 visits per month, and has 68 registered members.
- The Toolkit contains descriptions, experiences, how-to guides, and relevant links for web-based applications and face-to-face group processes. It features a “context” page where users can search for appropriate tools and methods by either defining the nature and needs of their work or using keywords (tags).
- FAO has become an official partner for the Toolkit.
KS Project website
- The site is continuously updated through the incorporation of Web 2.0 tools.
- The Toolkit wiki is the main resource featured on the website.
- A photo gallery, housed in Flickr, contains more than 1200 images (including photos and illustrations). As of October 2008, it was registering an average of 120 viewings per day.
- The KS blog receives more than 1000 visits per month.
- More than 160 important resources are bookmarked, tagged, and dynamically shared on the home page.
- Users can also subscribe to website updates via RSS feeds.

Contacts: Simone Staiger-Rivas, Project leader (s.staiger@cgiar.org)
Andrea Carvajal, Assistant (a.carvajal@cgiar.org)
Expanding the horizons of KS in the CGIAR

Research data, like children, are born naked and helpless. The services of a ‘midwife’ go a long way to ensuring their safe delivery to the world of statistical analysis and interpretation. In particular, these newborn data should be swaddled in coherency, allowing them to be readily compared with other data and to serve as the basis for further scientific corroboration, refutation, and prediction. The success of current and future R&D depends heavily on these vital but sometimes thankless support tasks, collectively known as ‘research data management’.

At the International Rice Research Institute (IRRI) in the Philippines, research data management has been the focus of one of three recently completed pilot projects sponsored by the KS project of the CGIAR’s ICT-KM Program. The other two projects, also described here, are on the production of a short promotional video message, by the WorldFish Center in Malaysia, and the use of unconventional KS methods in institutional strategic planning, at the Center for International Forestry Research (CIFOR) in Indonesia.
Transforming IRRI’s research data into global public goods

The KS pilot project on research data management practices is just one component of a much larger IRRI initiative on better management of research data, information, and knowledge. That initiative is known as the Everest Project (http://cropwiki.irri.org/everest/index.php) and is led by Thomas Metz, of the IRRI-CIMMYT Crop Research Informatics Laboratory.

Everest responds to the now widely accepted view that the results of CGIAR-funded research must eventually be transformed into suitable formats and made readily available to the international community, well beyond the laboratories and programs from which the results emerged.

Part of the problem of research data not being handled systematically is a lack of training—and of training and reference materials—for those called on to actually manage the data. As Metz points out, it is often the research assistants on projects, those who coordinate field experiments and collect the data, who are also responsible for managing those results. While they may be adept at executing experiments or surveys to the letter of the chosen methodology, these scientists may know little about modern data management, a set of skills so often associated with the world of information technology, not agricultural science.

“Wikis are highly visible ‘works in progress’ that move away from traditional institutional controls on how and when information is vetted before being made public.”

Thomas Metz,
IKS Pilot Project Leader, IRRI
Wikis: Restaurant customers in the kitchen
IRRI’s data management cookbook is being developed collaboratively, that is, in wiki style. To unregistered users interested in seeing just the data management recipes and instructions, the ‘skin’ of the Everest website does not look like a wiki. However, registered users see the typical wiki interface that allows for joint editing, discussion, and tracking of changes to the data management tools.

“The wiki is a convenient tool for us to edit content that is then made available to a larger number of people,” says Metz. While he supports the open approach to product development and KS afforded by wiki technology, he is also keenly aware of the limitations imposed on its use by current organizational culture, especially the traditional publication process. Wikis, he notes, are highly visible “works in progress” that move away from traditional institutional controls on how and when information is vetted before being made public. As such, there is a good measure of institutional reluctance to overcome.

“This is like a restaurant allowing its clients to look into the kitchen and watch the food being prepared. That would be outside the comfort zone of many restaurant owners. It would be similar in a research organization where the mode of operation has long been to release only finished products—products that have been peer-reviewed and edited. That is still is, for many organizations, the common practice of sharing information with the general public or with the rest of the scientific community.”

Achievements
In reviewing progress, Metz notes IRRI’s KS pilot project has largely achieved its aims over the past year. First, a set of about 50 cookbook recipes for research data management is now available on the Everest wiki. Second, awareness of problems and solutions has been raised.
The main evidence of this is the emergence, within IRRI, of a community of practice for research data management, centering on the 90 or so people who have so far completed data management courses offered by Metz and his team. (Eventually, the full course contents will be available on the wiki as well.) “Our hope is that when new staff arrive, their supervisors and colleagues will tell them, ‘Before you open your first spreadsheet, go and attend the training course and look at the Everest wiki’.”

Looking to the future, Metz also hopes that the wiki can become a CGIAR-wide service, rather than catering primarily to the needs of IRRI staff, and perhaps eventually reach an even larger international community of researchers. As for the wiki’s content, the plan is to add a section dealing specifically with the management of social sciences data. At present the wiki is limited to agricultural experiment data and geographic data.

The storymercial: Fishing for donor support and partnerships

While IRRI’s pilot project helps scientific teams address a technical aspect of the research process itself, the WorldFish Center project has a much different agenda, uses a different KS vehicle, and its audience is external. It targets donor and partner organizations, with the aim of drawing their attention, through a short video, to the benefits of the WorldFish Center approach to building rural livelihoods in times of stress.

As its name implies, the “storymercial” tells a story, in this case centering on an Indonesian community’s efforts to cope with the devastating tsunami of December 2004. In explaining how the WorldFish Center works with partners to rehabilitate livelihoods following natural disasters, it promotes an idea about people-centered development. In just 2 minutes, it makes that message quite clear: research can help communities diversify their livelihood options, with a view to making local economies more resilient.

A few lines accompanying the video provide context: “Half the world’s poor live in coastal areas. These areas are often already under threat due to poorly planned development but challenges are made worse with natural disasters and climate change causing more floods and extreme weather events such as hurricanes.”
And for those interested in further details of WorldFish Center’s work with partners to rehabilitate livelihoods following natural disasters, a four-page PDF brief titled Waves of change can be downloaded.

When you click on the video button on the WorldFish Center website, you are presented with a YouTube screen. “Fish for life: rehabilitating lives after disasters” begins with scenes of crashing waves and trees being hammered by high winds in the Aceh region of Sumatra. Ibrahim Makam, the chief of a small fishing village, cuts to the chase: “The wave was over 20 meters high. My 200 palm trees over there were all gone.”

The video is a mix of village scenes, translated interviews, voice-over narration, local singing, dance, and rhythmical handclapping and percussion. These are punctuated by just a few written titles to introduce key options for diversifying livelihoods: crab harvesting, lobster farming, mangrove rehabilitation, and aquaculture. “WorldFish has widened our perspectives and helped to stabilize our economy,” Makam says in the concluding scene of the video. “But success also depends on our own efforts.”
Between early September and late October, the YouTube site had counted over 370 viewings of the video (which doesn’t include hits by visitors to the WorldFish Center website). Helen Leitch, WorldFish Center’s Director of Business Development and Communications, headed the KS pilot project. Why did she opt to communicate the WorldFish Center message via a video? “Story telling is the oldest form of sharing information,” she says. “Videos appeal to the senses. We hope the storymercial encourages greater interest in our work.”

Leitch notes that most of WorldFish’s Center’s public awareness materials have traditionally been text-based, but that in an era of information overload, other communication channels are needed. Besides the two-minute version, WorldFish Center has also produced a 90-second clip which will be made available to television stations and other outlets in the region. Meanwhile, Leitch and colleagues are carrying out a survey of partners and donors to obtain feedback on the video. Among those surveyed are the organizations that funded the video: the Australian Centre for International Agricultural Research, Caritas Internationalis, Force of Nature Aid Foundation, Ford Foundation, the German Federal Ministry for Economic Cooperation and Development, the United States Agency for International Development, and the CGIAR.

**Practical advice**

The WorldFish Center has recorded its experience in producing “Fish for Life” as a set of guidelines in the KS Toolkit.

The guidelines are organized in step-by-step fashion under six headings: Is your project newsworthy?; introduction to making a storymercial; guide script; pre-production; production; and post-production.
Here are a few examples of the advice given for making an effective storymercial:

- “Using one example instead of five will keep the video from being monotonous and boring. Show critical aspects of your project that are most visually pleasing and convey the overall philosophy of your organization.”
- “Using a professional film producer maximizes the chance that the film will be picked up by CNN, BBC, or incorporated into a documentary for TV.”
- “A video is not a report; it must connect with people, be relatable and entice the audience to keep watching…. Include the most dynamic and knowledgeable staff and the most visually compelling settings.”
- “A short video (1 to 3 minutes) can take from 1 to 3 days to film, depending on location and weather. Shooting must be planned for the most effective use of time and lighting in the day.”

Strategic planning at CIFOR

When a research organization embarks on a discussion of its mission and how to achieve it over an entire decade, it’s only natural to want such a strategic planning exercise to be creative, open, well-informed, and comprehensive. That means drawing heavily on the knowledge and experience of staff, trustees, and stakeholders. After all, a lot is riding on the outcome: the impact of research on the lives of the intended beneficiaries; contributions to the global knowledge base; scientists’ reputations; the stability and magnitude of future funding; and in some instances the very survival of the institution.

In 2006, the Board of Trustees and management of CIFOR decided to formulate a new institutional strategy for the period 2008-2018. This was in keeping with a recommendation of the 2005/2006 External Programme and Management Review (EPMR) of the Center. From the outset, it was recognized that the better the engagement of staff and board members in a creative process of reflection, the greater the probability of a solid strategy emerging. For CIFOR, the new strategy had to be dynamic, flexible, responsive to changing conditions, and, above all, relevant to the needs of the world’s forests and the people whose livelihoods depend on those resources.
CIFOR scientists and research support units had already been introduced to modern approaches to KS at two annual staff meetings, in 2005 and 2006. Because these earlier ICT-KM-supported initiatives had proven successful, CIFOR managers felt they could be repeated, to good effect, for the forthcoming strategy development consultations.

“If you’re going to formulate a new strategy, you need to have staff informed, aware, involved,” says Fiona Chandler, formerly CIFOR’s Program Development Coordinator and now with the Office of the Alliance of CGIAR Centers in Rome. “The idea was that annual staff meetings are important to strategic planning because they are the one time of year in which you have everyone assembled under one roof.”

“*If people are involved in developing the strategy, it has to be a two-way process... The idea is to see how we can attach to the alignment plan different KS tools and techniques that we’ve learnt have been successful at CIFOR.*”

Fiona Chandler, formerly with CIFOR
The aim of the resulting KS pilot project, led by Chandler and two other senior CIFOR staff, was to ensure full and open discussions on CIFOR’s core values by all staff, at the same time reinforcing the value of using KS techniques to improve internal communication and to build trust. Conducting the strategy exercise this way was seen as an opportunity to foster “a culture of organizational learning and change” within CIFOR. “A strategy developed without adequate staff participation,” warns the KS pilot project proposal, “will be difficult to implement due to lack of awareness among the people who are supposed to put it into practice.”

Linking KS methods to the Stanford framework
The strategic planning exercise, which began in 2007, was based on a framework developed by the School of Business of Stanford University, USA, for use by not-for-profit organizations. CIFOR created five task forces, one each to consider the Center’s
mission, external environment, research priorities, competitive advantage, and strategy implementation (“making it happen”). Task force leaders and interested staff were provided training in a variety of KS methods such as Appreciative Inquiry, World Café, and Open Spaces (see the Toolkit website mentioned above) which were then applied during planning meetings in 2007 to stimulate CIFOR staff participation.

The resulting strategic plan, titled “CIFOR’s strategy, 2008–2018: Making a Difference for Forests and People,” was approved by the Board of Trustees in May 2008. The actual strategy has been “signed, sealed, and is now being delivered,” explains Chandler, and with this provisions have been made for a parallel, Board-approved ‘alignment plan’, aimed at keeping implementation of the strategy on track.

“If people are involved in developing the strategy, it has to be a two-way process.... The idea is to see how we can attach to the alignment plan different KS tools and techniques that we’ve learnt have been successful at CIFOR, ones that resonate with the community there.”

In this vein, KS techniques were once again used during the October 2008 staff meeting which focused on ensuring CIFOR’s various research domains harmonize with the new strategy. These techniques included Open Space, World Café, Fish Bowl, and the River of Life.

Chandler has received encouraging feedback from two key external sources. First, the Director General of another CGIAR Center told her recently he had heard CIFOR’s strategic planning had gone well. He said he was therefore interested in trying out some of the KS methods that had been successful at CIFOR. That kind of reaction is “always a good sign,” says Chandler. Second, the CGIAR Science Council, in reviewing the new CIFOR strategy, made special mention of the participatory, open methods used by the Center.
Meanwhile, Feby Litamahuputty, CIFOR’s Program Development Unit Administrator, has designed and is implementing a ‘reflection exercise’ to obtain feedback from CIFOR staff around the world. “I’m really looking forward to seeing the results of the questionnaire we’ve sent out to all those involved in the development of the strategy,” says Litamahuputty.

KS Website: www.ks-cgiar.org
KS Toolkit: www.kstoolkit.org

The text of the three pilot projects has been written by Gerry Toomey, a Canadian science writer.
The Knowledge Sharing project is funded by the ICT-KM Program of the CGIAR

www.ictkm.cgiar.org