

Knowledge Sharing in the CGIAR

“Help energetic communities thrive”

Record of a planning meeting for the CGIAR
Knowledge Sharing Project

CIAT, Cali, Colombia
April 21-23, 2004

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Summary

The Knowledge Sharing (KS) project¹ is 1 of 15 projects being implemented within the Information and Communication Technology – Knowledge Management (ICT-KM) Program of the CGIAR. CIAT is the lead institution for the KS Project, which was initiated in April 2004. Doug Horton began working with CIAT on April 14 on a one-third-time basis for 18 months to coordinate the Project. At CIAT, the KS Project is housed within the “*Information and Communications for Rural Communities*” (InforCom) Project led by Nathan Russell.

The Core Team of the KS Project includes:

- *Doug Horton*. 33% time on KM/S and 33% time on ILAC
- *Simone Staiger*. CIAT Communications Unit. 50% time. Coordination, administration, logistics, internalizing some of the KM skills, improved practical knowledge or the tools and techniques involved
- *Edith Hesse*. CIAT. Library. 15% time. Information, communications, library and e-publishing
- *Nathan Russell*. Communications Unit, InforCom Project. 10% time. Links with community/implementation level, and working with partners and community level
- *Kathy Alison*, TRG [<http://www.trg-inc.com>]
- *Mark Faul*, Bellanet [<http://www.bellanet.org>]

Background to the KS Project

The KS Project has its roots in the Ford Foundation-sponsored Organizational Change Program of the CGIAR. The OCP was managed by TRG and focused on two main areas: knowledge management and partnerships/alliances/collaboration. The OCP organized a number of seminars and workshops on its focus areas, piloted activities to strengthen knowledge management, teamwork and collaboration in some centers and worked to improve centers’ access to knowledge management tools. We believe the main challenge now is to facilitate *use* of KS tools that enhance the overall effectiveness of the CGIAR, its Centers, Challenge Programs and projects.

The KS project will have 4 priority foci of work: Challenge Programs, the policy level within CG Centers, projects within Centre programs, and other ICT-KM projects.

Stakeholders of the KS Project

The list of stakeholders for the KS Project is long, and includes: The systems office of the CGIAR; Donors/members of the CGIAR; Donors for future phases; CG Centre Directors; Joachim Voss; Scientists/researchers & international staff; National staff of CGIAR centers; Managers of Challenge Programs; Learning alliance project leaders (CIAT); Human resources and personnel division; IT Units; Poor farmers, local organizations (agricultural producers, research organizations); National & regional organizations; ILAC constituency; Other ICT-KM projects; the CGIAR Performance Measurement Working Group; the Standing Panel on Impact Assessment; the Information Management (librarian) community

¹ The full title of the project is “*Fostering a learning-oriented knowledge management and sharing culture in the CGIAR.*” For clarity and brevity, we use the term “knowledge sharing” rather than “knowledge management” or “knowledge management/sharing” throughout this report.

Statement of Purpose and Guiding Principles

We developed the following *statement of purpose* for the KS Project:

To encourage open and inclusive sharing of expertise and experiences among CGIAR staff members and partners, to support learning and change and improve the impact and effectiveness of our work

The KS Project Team will seek to adhere to the following “Guiding Principles”:

- KS activities will be linked to real ongoing activities and priorities in challenge programs and CG centers.
- The KS Project will seek to promote inclusion of (boundary) partners at the national and local levels.
- The KS Project will seek to engage with and develop the capacity of both national and international staff.
- The KS Project will seek to work at both the project and the policy level in each Center and Challenge Program with which it works.
- The KS Project should develop the capacity within the CGIAR to facilitate its own KS, learning and change.
- We should make sure that we model learning behaviors and “practice what we preach.”

Connecting the KS Project and the ILAC Initiative

The ILAC Initiative has its roots in a concern from an internal group of like-minded staff and supporters for making evaluation more effective in bringing about change. The KS Project has its roots in the OCP and the system-wide ICT-KM initiative. The 2 initiatives are being developed by individuals with different disciplinary backgrounds and work experience. ILAC has attracted people with backgrounds in innovation and science studies, management and evaluation. KS is more the domain of people who have worked in information management and development communications. For these reasons, the 2 groups tend to use different language to express similar concerns or to describe the same things.

We discussed the advantages and disadvantages of connecting or integrating the KS and ILAC projects. We believe that some degree of connection was highly desirable for the following reasons:

- There are strong similarities in goals, objectives, focus, values and methodologies proposed. In essence, both of these initiatives are concerned with bringing about sweeping changes in the CGIAR's ability to be more responsive and adaptable to changes in the external environment, and of building on internal experience and expertise, and learning from and strengthening relationships with partners.
- There is a great risk that having multiple initiatives would contribute to confusion. Already several initiatives are addressing similar issues (for example, the Gender and Diversity Program, the Strategic Advisory Service for Human Resources, ILAC, and the ICT-KM Program). The CGIAR system (and its staff!) cannot handle so many different initiatives, that are taking up an increasingly large portion of peoples’ time. It would be a disservice to the donors and the system to operate independently.
- Sharing of resources (including knowledge!) could be mutually beneficial and cost effective.

We began to think of an integrated conceptual framework for the KS and ILAC initiatives. The overarching title could be “***Knowledge Sharing for Institutional Learning and Change.***” An over-arching statement of purpose could be presented from 2 distinct perspectives:

ILAC perspective: Institutional change through learning from past and ongoing experiences promoted through instilling knowledge sharing practices and approaches.

KS perspective: The promotion of sharing expertise and experiences through knowledge sharing practices and approaches to encourage learning and bring about institutional change.

The joint KS-ILAC workshop will provide an opportunity for people to get to know each other, learn from past experiences and current practices, and plan how the two projects can operate in mutually supportive ways to achieve their common goals.

Introduction

The Knowledge Sharing (KS) project is 1 of 15 projects being implemented within the Information and Communication Technology – Knowledge Management (ICT-KM) Program of the CGIAR. CIAT is the lead institution for the KS Project, which was initiated in April 2004. Doug Horton began working with CIAT on April 14 on a half-time basis for 12 months to coordinate the Project. He also coordinates the initiative on “Institutional Learning and Change” (ILAC) for IPGRI on a one-third-time basis. At CIAT, the KM/S Project is housed within the project on Information and Communications for Rural Communities (InforCom) led by Nathan Russell. Other key CIAT collaborators include Edith Hesse, head of Information Management and Simone Staiger-Rivas, in charge of CIAT’s Web publishing.

On April 21 – 23, Doug, Edith, Nathan, and Simone met with Jonathan Darling of the Training Resources Group (TRG) and Mark Faul of Bellanet for an initial planning meeting.² This report attempts to record the main discussion points and conclusions reached during April 21 – 23.

Jonathan facilitated the meeting from April 21 – 23 and summarized the main points on flipcharts. Mark facilitated the meeting on April 24 and prepared detailed notes on the entire meeting. The present record is based on Mark’s notes and reflects the consensus of the group on each of the points discussed.

The objectives for the meeting, listed by the group at the outset, follow:

- Review the ILAC and KS proposals
- Develop a strategy for KS project
- Develop and initial work plan for the KM/S project
- Plan the initial KS ILAC joint workshop
- Define roles and responsibilities for the KM/S Project Team
- Discuss how we will work together as a team
- Begin to prepare marketing materials

² Nathan and Edith participated only on April 21 and 24, and Jonathan participated only on April 21 – 23.

Background to the KS Project

The core team met with Joachim Voss to basically introduce the project and set the context for the duration of the week.

History of ICT-KS Project

The KS Project has its roots in the Ford Foundation sponsored Organizational Change Program. The OCP was managed by TRG and focused on two main areas: (a) knowledge management and (b) partnerships/alliances/collaboration. Other crucial events / factors:

- CGIAR reform process – aimed to make the CGIAR more flexible, open and effective
- Naming of the Chief Information Officer in the CGIAR: Enrica Porcari
- Creation of Challenge Programs – cross-cutting initiatives involving different Centers and national partners
- World Bank contribution of \$5 million for the ICT-KM Program
- There is a “Standing Panel on Impact Assessment” within the CGIAR’s Science Council
- A performance measurement system is being developed by the Executive Council for the CGIAR

What are the main “givens” and key assumptions for the KS Project?

1. Activities must support program objectives in the proposal; we have some flexibility in the methodology
2. There will be an initial workshop in June and this will be a joint KS/ILAC workshop.
3. There is a need for more time and money to have significant system level impact. This is just the beginning
4. We are limited to \$372,000 for KM/S and \$300,000 for ILAC through 11/05
5. This effort must support the broader ICT/KM investment goals
6. We need to consider how we will address monitoring and reporting of this effort
7. The ILAC and KS initiatives have a lot in common

We believe the main challenge is to use KS tools for the benefit of projects and programs, not merely to provide access to tools.

Who is involved in the core KS team?

TRG

Training Resources Group, Inc. is an employee-owned business devoted to improving the performance of people and organizations. TRG services include organizational development, strategic planning, team building, training, and facilitation. TRG’s extensive international experience includes work in over 115 countries throughout the world. TRG has full time staff members who work professionally in English, French, Russian, and Spanish. In addition to the CGIAR, TRG clients include USAID, the World Bank, UNDP, UNFPA, UNIFEM, the Environmental Protection Agency, the Department of Commerce, and a variety of non-profit organizations and private sector companies. TRG has worked with the member centers of the CGIAR for ten years,

both in the implementation of Center-wide initiatives like the Organizational Change Program, and in the provision of services directly for CG Centers. Additional information is available at TRG's website, www.trg-inc.com.

Bellanet

Bellanet [<http://www.bellanet.org>] is a not-for-profit international development organization, that promotes and facilitates effective collaboration within the international community, especially through the use of ICTs. International development practices are complex and require openness, flexibility and the ability to work in partnership with others. Bellanet aims to support effective development practice by sharing its expertise in information and communication technologies as well as its skills in facilitating organizational learning and the sharing of knowledge.

Bellanet focuses on 3 program areas: *Online Communities*, supporting communication through effective facilitation, and the use of ICT platforms for collaboration; *Knowledge Sharing*, helping organizations to support the sharing of ideas and networking among its people, rather than investing only in sophisticated technologies to manage knowledge; and *Open Development*, exploring the potential of Open Source software, Open Standards for equitable and sustainable information sharing, and Open Content, to ensure the wide distribution of information without compromising intellectual property rights of its creators.

Areas of Focus for the KS and ILAC projects:

1. Working with cross-centre projects: Challenge Programs

(http://www.cgiar.org/research/res_cp.html)

- Water and Food (Jonathan Wolley) <http://www.waterforfood.org/>
- Harvest Plus (Howarth Bouis, Bonnie McClafferty) <http://www.harvestplus.org/staff.html>
- Generation (Bob Ziegler) <http://www.generationcp.org/>
- Africa CP (ILRI)

2. Working at the policy level within CG Centres:

- CIMMYT – Anne Accosta (ILAC)
- IWMI – Michael Devlin
- CIAT – Gustavo Peralta, Fabiola Amariles

3. Projects within Centre Programs:

- CIAT – Learning Alliances – example of good knowledge sharing and collaboration: Mark Lundy, Boru Douthwaite
- ICRISAT – Shambu Prasad – Documentation of *innovation histories* and action learning experiences
- CIAT – Boru Douthwaite – Fostering *institutional innovation* in organizations working with farmer participatory research approaches
- IPGRI (Part of INIBAP) – Jamie Watts – Drawing lessons to enhance the impact of banana improvement on livelihoods in East Africa
- CIMMYT – Anne Accosta – Promoting a learning culture in a global research network

4. Working with other ICT-KM projects:

- Virtual Resource Centres – Dario, Project Leader (IPGRI), Carlos Meneses, Edith Hesse (CIAT);
- E-Publishing – Michael Devlin, Project Leader (IWMI), Edith Hesse (CIAT),

Anthony Collins (CIP), Mark Faul, Jennie Drew (IPGRI), Paul Neate (IPGRI)

In a telephone call, David Balson (coordinator for implementation of the ICT-KM projects) suggested that a goal for the effort should be to “*Help energetic communities thrive*” We like this concept

Understanding the Stakeholders of the KS Project:

Who do we have to please? Who are the partners? Who are the benefactors?

- The systems office of the CGIAR (Enrica Porcari and David Balson)? * (provide inputs for Enrica’s newsletter?)
- Donors/members of the CGIAR (contributing \$500K or more), Worldbank *(AGM meeting)
- Donors for future phases * (fund raising strategy)
- National level, community level (ex: ministry of agriculture in Colombia)
- CG Centre Directors * (? best strategy, to be discussed in Rome/May) @ (where engaged)
- Joachim Voss* (through Nathan)
- Scientists/researchers & international staff (social scientists and hard science) * (website publishing, newsletter, etc) @
- National staff from different centres * (ex: communications divisions) @
- Managers of the challenge programs * @
- Learning alliance project leaders (CIAT) * @
- Human resources and personnel division * (engage as partner, ex: Raj) @
- IT Units – * productively engage/clarify the role of IT units (as providing a support role to this project)
- Poor farmers (indicators of this!), local organizations (agricultural producers, research organizations) * Nathan through his program work, also through specific projects or activities (ex: Learning Alliances; CIAT/ASIA and ADB) @
- National & regional organizations (agricultural producers, research organizations) * Nathan through his program work, also through specific projects or activities @
- ILAC constituency (individuals and specific donors) * (Doug)
- Other ICT-KM projects * (with David, other?) @
- Performance Measurement Initiative * (Doug) @
- Standing Panel on Impact Evaluation * (Doug)
- Information management (librarian) community *

* = These are people/groups we need to be in direct touch with this year.

@ = Indicates the need to document results at this level; where we expect to see change as a result of this project.

We have to satisfy the goal of producing, and seeing, significant changes within the CGIAR and how it does its business, to make the CGIAR more effective, efficient, relevant.

Review of the KS and ILAC proposals

Review of ILAC Proposal:

The core ILAC team includes:

- Doug Horton. IPGRI. 33% time
- Jamie Watts. IPGRI Evaluation Unit
- Andy Hall. United Nations University.
- Anne Acosta. CIMMYT consultant
- Boru Douthwaite. CIAT Rural Innovation Institute
- Shambu Prasad. ICRISAT
- Robert Chambers. Institute of Development Studies.

There are 4 pilot cases:

- ICRISAT – Shambu Prasad – Documentation of innovation histories and action learning experiences
- CIAT – Boru Douthwaite – Fostering institutional innovation in organizations working with farmer participatory research approaches
- IPGRI (Part of INIBAP) – Jamie Watts – Drawing lessons to enhance the impact of banana improvement on livelihoods in East Africa
- CIMMYT – Anne Accosta – Promoting a learning culture in a global research network

Differences between KS and ILAC:

- ILAC has its origins in the concern that evaluations and impact assessments should contribute more to learning and change in the CGIAR.
- Implementation focus: ILAC focuses on 4 pilot cases. KS has a broader focus.
- The projects have different roots, histories and donors.
- The project teams often use different terms / language to express similar ideas.

Similarities:

- Very similar basic concerns: the need for change in the CGIAR
- Some of the same concepts
- Colncerrns for learning, sharing and change
- Use of some similar KS approaches
- Approaches to documentation, websites, discussion groups, workshops, publications, and reports

ILAC & KS moving forward:

- We should seek linkages, connections, sharing, synergy, and learning across the 2 efforts
- A goal for the first workshop should be to explore the pros and cons of intebration of the 2 efforts

Review of KM/S proposal:

The core team of the KS Project currently includes:

- Doug Horton. 33% time on KM/S and 33% time on ILAC
- Kathy Alison, TRG
- Mark Faul, Bellanet
- Simone Staiger. CIAT Communications Unit. 50% time. Coordination,

administration, logistics, internalizing some of the KM skills, improved practical knowledge or the tools and techniques involved

- Edith Hesse. CIAT. Library. 15% time. Information, communications, library and e-publishing
- Nathan Russell. Communications Unit, InforCom Project. 10% time. Links with community/implementation level, and working with partners and community level

We addressed three key questions:

- *What (if anything) would we like to change now in the proposal?*
- *What additions would we like to make to this proposal?*
- *Are there key points that need to be clarified?*

Some observations:

- The focus areas are now more clearly defined
- Linkages with other ICT-KM projects and how the KS project will link with other ICT-KM projects are now more clear and explicit.
- We have a better understanding of who this project will actually benefit and how it will benefit them.
- It is now more targeted to focus on specific accomplishable areas
- The focus on challenge programs is more explicit
- To work with Challenge Programs and with other ICT/KM projects, there needs to be closer integration with their own project plans & schedules for how this work will be carried out in a practical sense ... ie: meetings with key people, workshops, collectively defined objectives and expected outcomes.
- The methodology for implementation should emerge from consultation with focus area groups.
- It is fundamental that we have a participatory approach.
- We now may have a different concept of what a “KS strategy” is and how to develop it. We seek to accomplish strategic change, but perhaps not develop a full-fledged, detailed and polished called KM Strategy document. What we seek are changes in center policy/management procedures to support KS. This may be a way to overcome Centre resistance to “KM strategies” per se.
- The project proposal may be overly ambitious given available time and resources?
- We now recognize a stronger need for a more significant communication/marketing strategy
- The objectives of the 2nd proposed workshop may need to be changed
- A clearer funding strategy is needed
- The project methodology should be revisited in an initial workshop.
- The discussion of access to tools/methods should focus more on use of tools/processes.
- If the train-the-trainer approach described in the proposal is to be used, it will require more resources.
- We recommend to expand the focus to include capacity building among national staff.
- We would add the concept of helping energetic communities thrive
- The linkage between the proposed activities and cultural change isn't clear. We need to clarify what tangible things this project will do that will lead to

cultural changes?

Statement of purpose:

We agreed on the following as a statement of purpose for the KS Project activity

To encourage open and inclusive sharing of expertise and experiences among CGIAR staff members and partners, to support learning and change and improve the impact and effectiveness of our work.

An alternative statement of purpose:

Demonstrate open and inclusive sharing of expertise and experiences among CGIAR staff members and partners, to support learning and change and improve the impact and effectiveness of the the work in some centers and projects.

We propose these “Guiding Principles”:

- KS activities will be linked to real ongoing activities and priorities in challenge programs and CG centers.
- The KS Project will seek to promote inclusion of (boundary) partners at the national and local levels.
- The KS Project will seek to engage with and develop the capacity of both national and international staff.
- The KS Project will seek to work at both the project and the policy level in each Center and Challenge Program with which it works.
- The KS Project should develop the capacity within the CGIAR to facilitate its own KS, learning and change.
- We should make sure that we model learning behaviors and “practice what we preach.”

What are the expected outcomes? (in 18 months)

These were individually developed, not discussed in great detail.

- Active communities of practice
- Supportive policies within CIAT, IWMI, CIMMYT
- Regular use of knowledge sharing approaches (Peer Assists, AARs ** expand on this list of KS approaches)

- An understanding of the impact and lessons learned from prior activities
- KS is incorporated at a practical level in at least 2 challenge programs and in 3 centres, ICT-KM projects, and Learning Alliances
- KS is a more fully understood as as set of tools and processes that should be considered for every activity
- Funding is secured for 3-5 years

- Improved sharing of information and knowledge in energetic communities
- Capacity built for use of KS tools
- End users (NARS, farmers) better reached and empowered (specific project activities, learning alliances)
- Successful examples that will motivate other initiatives, projects, or centers to join the KS effort

- Resources for KS implementation, evaluation and scaling up
- External environment: donors and system-level bodies (science council, systems office) supporting KS
- Internal environment: culture & incentive that supports KS
- Management practices that support KM: KM strategies; HR policies; learning oriented performance M&E
- Appropriate knowledge, attitude and skills being used by managers and staff in CG centers, cross-centre activities

Two practical recommendations for CIAT:

- The annual review process could be modified slightly to share problems and lessons and not just report on positive results and achievements.
- Suggestion for the Wednesday Seminars at CIAT: Use them to seek inputs and assistance, not just to present final, positive results.

Moving towards a strategy for the KS Project

Problems:

- The CG not changing
- Confidence in CG is declining
- Partners often feel their needs are not being listened to
- Collaboration within and among centers is less than desired
- Centers are perceived as inflexible and insufficiently innovative
- There are few demonstrated impacts on poverty reduction
- There is considerable innovation at the project level, but it doesn't seem to lead to change at the level of centres and CGIAR system as a whole.

Strategy

1. Develop a clear message (Why should partners work with us? What's in it for them?). Target marketing for: management, project leaders, stakeholders.
2. Initiate contact with focus area partners
3. Get buy-in and commitment from focus area partners
4. Participatory planning approach for engagement leading up to workshop:
5. OCP REVIEW (Parallel to partner engagement). Identify contacts from OCP. Gather documentation, talk to people, interviews. Synthesize and collate information as input to lessons
6. Initial Workshop: (a) *Review experiences and draw lessons* from previous efforts: Kathy Allison: OCP. Mark Faul: Lessons from the KM4DEV discussions. Viki Wilde: Lessons from Gender & Diversity Program. (b) *Use lessons* learned for future directions. (c) *Operational planning* for ICT-KM project, CG centers, challenge programs, learning alliances.

Rationale for developing an overall KS-ILAC framework: “*Knowledge Sharing for Institutional Learning and Change*”

KS project – It is not just for the sake of doing KS. The purpose of KS is to promote adaptability to change through learning about past experiences and current circumstances through the expertise and experiences of individuals.

ILAC project – Encourages institutional change through learning from past and ongoing experiences, promoted through instilling knowledge sharing practices and approaches.

Rationale for Connecting KS-ILAC initiative:

- There are strong similarities in goals, objectives, focus, and values
- There are methodology linkages and overlaps
- There is significant advantage and utility in pooling of resources where appropriate

We want to be clear that this is not a merger of the two projects, but looking at pooling resources for the mutual benefit of each project.

KS Methodology – work with each of the focus area groups to identify their current situation and needs, and work with them to learn from and share past and ongoing experiences, and become more adaptable and responsive to changes. The approach is to listen to implementers of ongoing activity and help them identify a set of tools and methods to help them increase impact.

The goals of these two efforts are essentially the same, we must not contribute to the confusion of having multiple initiatives. Already there are multiple activities in process trying to address this or similar issues (G&D, HR, ILAC, ICT-KM, HR-SAS). The system can't handle too many. It would be a disservice to the donors and the system to operate independently.

ILAC has its roots in a concern from an internal group of like-minded staff and supporters for making evaluation more effective in bringing about change.

KM/S has its roots in the OCP, and the system-wide ICT-KM initiative.

In essence, both of these initiatives are concerned with bringing about sweeping changes in the CGIAR's ability to be more responsive and adaptable to changes in the external environment, and of building on internal experience and expertise, and learning from and strengthening relationships with partners.

Statement of purpose from 2 perspectives:

ILAC perspective: **Institutional change through learning from past and ongoing experiences** *promoted through instilling knowledge sharing practices and approaches.*

KS perspective: *The promotion of sharing expertise and experiences through knowledge sharing practices and approaches, to encourage learning and bring about institutional change.*

The joint KS-ILAC workshop is an opportunity for people to get to know each other, learn from past experiences and current practices, and plan how the two projects can operate in mutually supportive ways to achieve their common goals.

Elements of the KS Work Plan

Includes lead areas of responsibility and timing

- Set up & facilitate a virtual discussion space – Dgroup – for the project team; and for the broader group. Document and resource sharing through the online website (MF) April 24
- Develop a 1-2 page rationale document for connecting KS & ILAC (DH &

- Team) – draft by April 29
- Get buyin from ILAC & ICT-KM project team for connecting the projects (DH) talked to them by April 29
 - Future funding strategies – necessary, but where does this fit? (NR & Team)
 - Developing the communications messages for the workshop (SS, NR, Anne & Team) our plan of action, what is the project about, inviting others to come together to understand the relevance of this project to them, and help us define how we can best work to help them. Updated version of proposal, and items of content that need to be developed and discussed (DH) April 29
 - Contact Fiona Douglas, CG Secretariat for CG style and standardization, linkage for KS site (NR) April 29
 - Why is ICT-KM site divorced from CGIAR site? (Doug to talk to David and raise in May meeting)
 - Designing the look / image – logo, draft style (NR, SS) end of May
 - Publicity content (NR) July-Sept
 - Developing marketing/communication materials for different audiences (PDF brochure, website) (SS, NR, AA & Team) July-Sept
 - Website – information resources on KS & learning approaches (agreement on how we do this? Issues around KS-ILAC presentation; where is this hosted, how is it branded? Branded as CGIAR... hosted independently? www.cgiar-ksilac.org? Hosted at ciat?) ... to be discussed with the project team! (SS to develop, setup host) *prototype before the workshop*
 - Access to tools? Just a website, or a “tool kit” (good practice) as well? Good understanding of what is available as tools/methods/approach, and how people can not just access tools, but make GOOD use of them. (facilitation skills) (EH & Team) mid-June
 - Assess what is relevant (tool kit) from the other projects, from the Rome workshop (EH) report back by 2nd week of June
 - Initiating contact (draft message shared with team) with the focus area projects (leaders, others within the groups & centers?) [are these the right groups, interested parties and energized] (DH) April 29
 - Understand focus areas better (research focus area groups) (MF to engage group to provide key docs/info; SS to search for info) April 29; leading up to workshop
 - Communications strategy – public face – how to engage broader interested parties... an approach for engaging all of the various stakeholders; Interaction with system-level bodies, donors, etc (SS & NR) proposed strategy for the workshop
 - Coordinating the project (ensuring timelines are met, workplan moving forward, etc) (DH) ongoing
 - Talk to Steve Song about past work with CG Centers (MF)
 - Capturing the process – ongoing monitoring and documentation / reporting
 - Process monitoring – outcome mapping journals?
 - Evaluation meeting in Rome
 - Regular online chat? (MF) weekly

Planning for the initial workshop

- Dgroup for workshop participants (MF) April 29

- Confirmation of date and location – 22-25 June (DH) April 29
- Project team objectives and focus ideas (draft agenda building upon existing proposal, of what we would like to focus on and get out of the workshop) (DH) April 29 draft
- Engage participants on workshop content (virtual discussions) – revision of that draft agenda (MF & Team)
- Ongoing virtual discussions on current practices and past experiences of workshop participants (how far do we go with this prior to the workshop?) (MF & Team)
- Logistics (travel, expenses) (SS & Rebecca)
- Workshop planning process based on outcomes of virtual discussions – session facilitation/leads/presentations ... participatory discussion approaches (KA, MF)
- Background research on lessons learned from OCP project – do we bring someone in to do this, and present at the workshop? Do we do it ourselves? (SS)
- Lessons learned from other organizations – KM4Dev Community (MF) workshop presentation
- Review and lessons from TRG on the OCP, and prepare presentation for the workshop (MF contact KA about this) April 29
- Training? Learning Workshop? Will part of the workshop focus on learning about KS & learning approaches? (KA, MF)
- Final dates for the workshop: June 22-25

Elements for the work plan after the workshop

- Ensure that National level capacity building is integrated into the programming (SS, DH)
- Train-the-trainer component – developing capacity in the system to take this forward and apply to different constituencies
- Developing and support implementation of strategies with centers and cross-centre activities (Challenge Programs)
- Work with ICT-KM projects
- Work with ILAC pilot cases
- Work with the Strategic Advisory Services for Human resources
- AGM presentations 2004 & 2005
- Review & Synthesis Workshop – Sept 2005
- Team meetings over the 18 months?
- Meetings related to the focus areas
- joint activities

Appendix: Issues and Alternative Statements of Purpose

Some issues raised during the meeting

What should this project's "brand" be? We recommended using KS, and emphasizing knowledge SHARING.

How will we interact with the Performance Measurement Initiative?

Will we have 12 or 18 months? We confirmed that we will, in fact, have 18 month.

Is this an umbrella project for the other ICT-KM projects? It wasn't conceived of as an umbrella project, but the links haven't been thought through well. KM/S is about behaviors, relationships and rewards. It is not the job of the KM/S project to make the others work.

In discussion David B, we confirmed that this is NOT conceived as an "umbrella" for the others. Perhaps we should pick a few logical connections to develop with other ICT-KM projects. But there are 2 things to be aware of:

1. The whole ICT-KM venture is being criticized by some as being a repetition of the OCP without anything new. The concern is that the OCP was too theoretical and not practical enough. The situation is different now, though. The pressure for change within CGIAR is much stronger now, and there is a better understanding of KM/S.
2. The connections between ICT and KM are not well understood. Linkages need to be developed, for example through work with the virtual resource centre and the e-publishing project.

What should the relationship be between the KS project and the ILAC Initiative?

We think this effort should tap into expertise of national staff in the centers.

It's important not to be, and not appear to be, top-down in our approach. We need to be open, transparent, and inclusive.

Draft Statements of Purpose

The purpose of the KS Project is to encourage more transparent sharing of expertise and experiences between CGIAR staff members and other staff members and partners, to improve the impact and effectiveness of the CGIAR's work.

The purpose is to more fully integrate KS as a standard way of doing business in the CGIAR.

The purpose is to contribute to the CG effort of becoming a learning organization; support and strengthen energetic communities (initiatives, cross center programs, projects in CG centers) in use of KS methodology, tools and techniques.

We will foster KS in the CGIAR, in support of ILAC, so the CG center Challenge Programs become more relevant, efficient and effective in achieving the CG's goals.

Sharing > Learning & Change > Impact.