Notes on the Meeting

First day

After opening remarks by IDRC’s President, Maureen O’Neil, and Regional Director for Latin America, Federico Burone, Andrés Rius (IDRC Regional Office at Montevideo) and Miguel Lengyel (FLACSO/Argentina) started the morning work session by briefly referring to the goals and mechanics of the meeting. They both stressed the expectations that the seminar served for network managers to get insights into how to better deal with their mission and contributed, therefore, to add value to the work already being done elsewhere on knowledge network management. To that end, Rius and Lengyel emphasized the workshop format around specific issues chosen for the meeting.

To provide the framework for the debate about the internal management of networks, Heather Creech from IISD presented its paper *Measuring while You Manage: Monitoring and Assessing Network Performance*. Creech pointed out several crucial points for the effective management of knowledge networks, among them:

- Drawing a strategic plan (definition about people to be targeted and relationships to build, identification of what knowledge is needed and how to make that it is delivered, etc.);
- Developing indicators measuring changes in internal relations, among those the network tries to influence, in the knowledge base and in communication practices;
- Monitoring network processes;
- Reviewing network performance against the plan;
- Conducting adjustment if needed; and
- Implementing assessment by external criteria.

Creech’s presentation elicited several questions and comments by the participants concerning among other aspects: the issue of internal conflicts and how can it be managed; the challenges the evolution of networks poses for their evaluation; the need
of additional criteria to the project’s ones to assess networks and their life-cycle; and the role of informal vs. formal roles for management.

The morning work session was closed by a short presentation of managers about the central characteristics of their networks as well as their main achievements and management problems, dilemmas and or challenges. It is interesting to note that, notwithstanding the different types of networks involved, these presentations highlighted several common concerns about knowledge network management such as “ownership” on network activities, effective involvement of membership and long-term sustainability.

The afternoon work session was devoted to the group discussion around key sets of issues concerning the internal management of knowledge networks. Three groups were formed integrating network managers, experts and IDRC staff, each of one addressing one of the following sets:

1. **Organizational dilemmas**
   - Strengthening identity while enhancing performance
   - How to deal with the different meaning of membership as a result of the diverse locations of the researchers
   - Making multiple stakeholders (different sectors/types or organization) work together
   - Do different perspectives need to be resolved? The management of internal conflicts
   - Permanent structures vs. ad-hoc structures? How to enhance institutional capabilities?
   - Balancing the search for excellence and the strengthening of the weakest nodes

2. **Achieving meaningful cooperation**
   - How much do preconditions (previous relations, trust, etc.) matter?
   - Pondering incentives for cooperation (economic rewards, ownership, reputation, etc.)
   - Balancing strategies for achieving local and regional impact

3. **Networks as learning organizations**
   - Taking stock and applying acquired knowledge
   - The role of managers as catalyzers

The groups maintained a very reach and substantial discussion, providing the following reflections on their work:
Group 1 – Organizational dilemmas

The management of internal conflicts—strong vs. weak nodes

- More convenient to think of “weak ties” rather than weak nodes, as a node could have weak links within the network, but strong links with other relevant external actors;
- Strengthening links would thus be a means for strengthening nodes as well as a clearer definition of the network identity;
- In any case, there is need of a better understanding of what is a weak node, issue that should not be addressed with a centralized rationale.

Network growth and size

- There is a relationship between identity, performance and quality and network size and link strength; therefore, the growth timing and dynamics should be attune with the external goals of the network and the actions directed towards its context. A network size should be related to its goals and sustainability;

Network sustainability

- While securing funds is fundamental, it is also essential the creation of “trust spaces” and an efficacious resolution of conflicts. In this sense, a guideline for management is to solve diversity not to dilute it. In other words, network internal heterogeneity must be productively managed so that to favor a shared orientation and avoid dissolution;
- Management problems in networks stem to some extent from network origin. Two ideal types must be distinguished in this regard:
  - Networks which are borne through an agreement with a financing institutions and whose goals and interests are jointly defined by the donor and the beneficiary institution;
  - Networks that are born from already existing shared goals and interests and, as a result of their growth, get involved later with a financing institution. This interaction brings new norms and definitions with ensuing tensions and conflicts.
- Another source of management challenges is the fact that network necessarily related with other organizational forms that are not networks, i.e., bureaucratic organizations, corporative groups, etc.. These relations have no doubt influence on the way a network is organized.

Network coordination

- Network coordination must counteract a permanent trend towards centralization. Donors may unwittingly favor this trend through their evaluation system focused on coordination. In view of this, it would be key to review criteria and mechanisms for evaluation;
- It is important that coordination works on the basis of “least-common-denominator” norms;
- Network forms of organization have scarce “antibodies” to avoid the action of those members that seek appropriation of predominance. In this case, conflicts are not easy to handle and tend to favor bureaucratization or dissolution.

Group 2 – Achieving meaningful cooperation

The group decided to address the first two issues.
**Pre-conditions for success**

- First precondition is to have a cause: the belief that something needs to be improved or fixed.
- Second precondition is the decision to jointly work.
- Third precondition is the existence of a commitment with regards to a situation that may involve a high degree of voluntary or non-paid effort.
- Fourth aspect is the existence of trust and a shared vision within the initial group that ignites the network. This trust is an asset that must grow as new members get into the network. In a second moment, it is important that the initial group avoids endogamy and opens itself to new ideas and new “blood” to keep growing.

**Pondering incentives for cooperation**

- Incentives come with the individuals forming the networks, in that these have a cause geared to change a situation. Somehow, incentives come “from below”;
- In the case of formal research networks, incentives usually stem “from above” or from a “research nucleus”, and include:
  - Reputation/visibility: each network member (individual or institution) makes its work more visible or better known through its involvement in the network;
  - Financial incentives: to have access to broader opportunities for funding by the very fact of belonging to specialized global and regional networks;
  - Learning and updating: this is an incentive particularly relevant for the weakest network members. This would imply that networks play a tacit role of “trainers” of its weakest nodes, which usually keep a lower profile but learn in the process of exchange of ideas and information internal to the network.
  - Personal contact: a sort of reciprocity commitment of members towards the network coordination when the latter establishes a more personalized communication strategy through different means (phone calls, visits to the members, periodical meetings, etc.).
- Transaction costs: acknowledging that sustained engagement entails time and resources, an IISD project included funds in its budget to “pay for” the required engagement time of participants. The justification was to enhance the capacity for participation of some national teams of the network, i.e., China and Zimbabwe, which found it difficult to keep pace with the rhythm of electronic discussions established by their Western counterparts. This means to accept that collaborative work and network is a new form of working to which institutional structures and processes has yet to fully adapt. Yet, donors often resist affording the cost of working as a network, expecting that those transaction costs are beard by the beneficiary institutions as administrative costs, whether or not these costs are employed to support members’ activities.

**Group 3 – Networks as learning organizations**

The group focused the discussion on defining a adequate profile for the manager of knowledge networks.

**Manager profile**

- Capacity to build new relationships;
- Skills to detect and strengthen relevant capabilities within the network;
- Skills for focus and synthesis;
- Appropriate balance between technical and administrative capabilities;
- Fund raising skills;
- Capacity for efficient process management and administration;
- Capacity to convene external experts and develop new alliances that rise the network political capital.
- Capacity to “open/close the loop” (open and close processes).
In addition, the group provided some thoughts about other aspects of networks as learning organizations.

**Monitoring and assessment**

- Two levels of evaluation: outputs and processes. In general, evaluation routines focus on outputs of network activities, measuring only those aspects that are tangible.
- It is necessary to generate tools to assess processes, so that to fully capture and ponder the networks’ behavior and thus enhance its capacity to generate and transfer new knowledge (i.e., resource based evaluation vs. outcome mapping);
- Many evaluation problems have to do with the fact that donors timing is not the same that network timing;

**Conditions for appropriate network management**

- Established work plan and codes of practices;
- Clearly predefined tasks;
- Clear determination of responsibilities;
- Statement of rights and duties;
- Related costs and benefits:
  - Incentives for participation;
  - Recognition of contributions;
  - Development of competitive processes;
  - Clear processes of resource allocation.

**Second day**

The presentation by Jan Martin Witte of his paper *Progress or Perils? Evaluating Networks and Partnerships as Governance Tools* provides the starting point for the second work session. Building on the assumption that networks are essentially political animals that have to be seen as governance mechanisms and not just as coordination devices, Witte distinguished among different types of networks (negotiation, coordination, implementation) and discussed some critical challenges they face as well as various best practices for their operation. In particular, Witte mentioned among the former:

- Getting the networks up and running;
- Balancing consultation and delivery;
- Dealing with power asymmetries;
- Meeting the dual challenges of inclusion;
- Maintaining “structured informality”; and
- Ensuring transparency and accountability.

As for best practices, Witte stressed the need of a learning approach including:
- Encouraging individual and institutional leadership;
- Milestones and early wins;
- Transparency and capacity building, trisectoral funding;
- Openness, capacity-building;
- Promoting learning, reviews; and
- Pluralistic system of accountability.

Following Witte’s presentation, the second round of group discussion, on the relationship between networks and their context, took the rest of the morning session. Two groups were formed, each one of them dealing with one of the following sets of issues:

4. **Towards the social embeddedness of networks**
   - Democratizing the production of knowledge: From networks as closed systems to networks as open sources
   - Institutional devices for increasing participation: engaging actors without organizational dilution
   - Boundaries of membership: the tradeoff between enhancing the value of belonging and favoring network’s porosity

5. **Communications in networks**
   - How to increase the visibility, profile and influence of networks
   - How to broaden the external audience of networks as recipients of substantive knowledge
   - How to turn the network’s knowledge-producing participation practices into a wider public good

The results of the group discussion can be summarized as follows:

**Group 4 – Towards the social embeddedness of networks**

The focus of the discussion was the interplay between knowledge networks and their environment, in particular the mechanisms, links and dynamics that affect such interplay.

- It is crucial to ensure the use of knowledge and it is important to note the key role networks may play to that end. For this to obtain, a fundamental condition is that stakeholders (interest groups, social actors) are engaged very early in the development of networks. In this way it is greater the likelihood that those actors identify themselves with the results of research. From this perspective, it is advisable that actors get involved in the definition of what is going to be studied, to ensure their dynamic interaction with researchers. By the same token, it is obsolete the traditional model that regards the dissemination and use of research/knowledge as a final step in the sequences of a research project;
- At the same time, the democratization of information is a process that requires some time to mature, involving thus different forms of relationships with stakeholders. When and how to
engage them is an issue that each network has to define according to its nature and type of context in which it acts.

- Building communication and participation bridges with external actors is, however, a necessary but not sufficient condition. Transparent mechanisms of engagement are essential to avoid the emergence of participatory biases resulting from the emergence of foci of power accumulation around particular interests;
- The engagement of social stakeholders does not mean that the establishment of roles is not necessary. When and how non-academic actors must engage in research? Although the interaction between scholars and other actors and their power relations shape to a large extent the spaces for involvement, networks need to have skills to guide participation;
- Given that networks incorporate actors with different interests and agendas, the existence of irreconcilable differences should set the limit for coexistence within networks; otherwise, the effectiveness of networks to fulfil their mission might be seriously impaired;
- The incorporation of stakeholders in the definition of research problems may make it easier to solve conflicts if they arise and ensure that the topics to be addressed are politically relevant. At the same time, this should not be confused with eliminating the autonomy spaces that researchers need to enjoy;
- Rules of engagement are essential to favor the democratization of the traditional academic structures and practices and effective representation of all those with interests at stake. Without those rules it is usual to observe manipulation and co-optation practices by those more powerful or resourceful or the reproduction of knowledge demands already satisfied;
- The extent to which knowledge is embedded in society helps to define its “political” legitimacy. This legitimacy must be complemented by technical legitimacy for the activity of knowledge generation to have an impact.

Group 5 – Communication in networks

- It is important to take into account communications both within and outside the network:
  - Internal communications and their management are especially important for the creation of network identity and its members' sense of belonging. This sense of belonging has also an outward looking aspect, which is the collective creation of the network products;
  - External communications: it is fundamental to design and implement a specific strategy from the beginning of the network work. Questions that should guide this strategy include for what, what, how, when, to whom and by which means to communicate;
    - For what: to achieve a strategic influence. In this case, what to communicate is a specific product in terms of content and target audience; when the goal is instead to secure the network survival, what to communicate should be a product directed to a broader audience-
    - How to communicate: It is key to acknowledge that a network product are collective and not individual creations. When this work as a net is ignored can bring damage both for the network and for its members. This is particularly important when strategic communications are at stake, although should not be overlooked in the case of mass communications.
    - When to communicate: Its definition requires systematic actions that need to be thought from the beginning of the network and not just at the moment of having a final product.

- Some specific recommendations:
  - The communication strategy must be defined from the beginning of working as a network. This means that the costs of designing and implementing it must be included in the budgets submitted to the donors. The language(s) to be used as well as translation costs must also be considered at that moment;
  - It is necessary to build capacities within networks for designing and managing of communication strategies;
  - It is advisable the implementation of conduct codes in order to effectively achieve that
network products are delivered to the public acknowledging the collective intellectual ownership over them.

- Some bad practices to be avoided:
  - The use of internal jargons, which are usually unknown for network audience; and
  - To overestimate the need to reach mass media.

In the afternoon, Rius and Lengyel made a summary of the discussions held, highlighting the major findings the meeting brought about.

In particular, Rius stressed the following points:

- The workshop made it possible to identify a series of management choices faced by networks, on which hinges their effectiveness and efficiency. The following are some of those areas that came up more frequently in the discussion:

  - Nature, shape and functions of coordinating nodes
    a. TOR and skills of coordinating unit/members (& leadership style)
    b. Resources (time, $) to be devoted to coordination work (vis-a-vis substantive work)
    c. System of accountability (coordinators to members)
  - Forms of participation, nature of exchanges
    d. Incentives for participation (including their sequencing)
    e. Various roles for members (roles of weaker/stronger members; etc.)
    f. System of accountability (members to other members and to coordinators)
  - Interface with the external environment
    g. Type of social embedding
    h. Priority stakeholders (boundary partners)
    i. Communications strategies

- The list is by no means exhaustive, nor it pretends to be original. From the discussions, it seemed that the exact nature of the choices that lead to enhanced effectiveness and efficiency is very much goal and context dependent. It also appears that, while some good practices can be identified and were showcased at the meeting, there would be need for more research on the effect given choices have on certain types of networks’ capacity to achieve their goals without major waste of resources.
Not surprisingly, various participants highlighted the importance of a network strategy, or a strategy. Some key benefits of an explicit (as opposed to an implicit strategy, that any network or organization could be said to have, anyhow) are:
- It forces to be explicit about goals, objectives and expectations;
- It makes it possible to learn.

Without getting into any detailed methodology to approach that, the latter aspect of a networks strategy should ideally materialize at least in a monitoring and evaluation strategy, including a proper set of indicators and measurement and record-keeping mechanisms.

The choice areas detailed above could also be seen as component elements of a network’s strategy. As with goals and expectations, making these choices deliberately and explicitly would generally seem desirable to having them made spontaneously and/or by reaction to external pressures or events. The extent to which they are centrally or hierarchically made, or made in more participatory fashion, is another area where besides some apparent good practices there seem to be no generally valid rules.

Lengyel, in turn, emphasized the following points:

Networks are organizational forms characterized by multiple equilibrium points, which are frequently unstable and of varying duration. Just to illustrate, which is the right mix of time and resources managers should allocate to their substantive and administrative tasks? How does this mix vary overtime, as networks evolves? By the same token, how to appropriately blend stakeholder participation with expeditious decision-making? This means that networks are largely experimental and pragmatic, not routine and standardized. Almost by definition, it seems impossible to think of “frozen” organizational designs and practices; therefore, the management choices Rius has mentioned are particularly complex.

In this sense, the workshop has been extremely useful to identify some significant “management common ground” by delivering not specific recipes but various criteria for decision-making and operational guidelines and on which all networks may rely upon, notwithstanding their specific configuration and goals;
More specifically, discussions have clearly indicated that network evaluation is a very sensitive issue and that some critical aspects should not be overlooked:

- Insofar as networks are inherently dynamic and changing, their evaluation seems to be a moving target. This means that criteria, methods and instruments for that task should probably be adjusted *pari passu* with the transformations networks undergo;
- Evaluation criteria for networks should be different from those usually employed for project evaluation; and
- The relevance of evaluating both results and process cannot be overemphasized.

### Attendants

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