

Deepening a Culture of Reflection: IDRC's Rolling Project Completion Report Process

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While “rPCR” may sound like the name of a Star Wars character, it actually stands for “Rolling Project Completion Report”, which is IDRC’s new process for generating and sharing learning from its projects.

Working in close collaboration with researchers from the developing world in their search to build healthier, more equitable, and more prosperous societies, IDRC’s mission is “empowerment through knowledge”.

IDRC supports knowledge activists and innovators around the globe in order to promote interaction and foster a spirit of cooperation and mutual learning within and among social groups, nations, and societies. To do this, IDRC must ensure its own staff is knowledgeable and innovative, continuously learning and improving.

The knowledge drain

In the past, the project completion report (PCR) leaned mainly toward the "auditing" function: its chief purpose was accountability. The static document made judgments about the substance of the project and tracked the funding that had supported it. The report considered such questions as: Did the project achieve its stated objectives? What were its measurable outcomes? Was the public funding properly spent?

Normally, this report was prepared by the IDRC program officer and submitted to a manager for approval. Presented in written form, in response to a template of standard questions, the report was designed to be part of the official documentation of IDRC and of its corporate memory. PCRs were drafted only at the conclusion of a project, by which time memories had faded, staff had moved on, and issues and priorities had changed in short, they were written when learning was least likely to happen.

This approach fulfilled basic accountability adequately enough. Often, however, it failed to generate and capture the rich store of tacit knowledge that occurs during the life of a project.

What's more, because of the everyday pressures of other priorities, these reports were seldom seen by anyone other than the manager who approved them. The fact that the issue was widely known only compounded the problem. When staff realized that their project completion reports were unlikely ever to be read, they understandably became reluctant to put time and effort into preparing them. As a result, a large backlog of uncompleted reports arose and when these people left the program or the organization, IDRC suffered a "knowledge drain".

Learning regained

Now, after investing in a lengthy and wide consultation, IDRC has found a solution to these problems. The organization has introduced a much more appropriate approach of project reporting. It is more than a mere technical adjustment; it is an attempt change the culture of the organization. This solution is an innovative process called the "rolling project completion report", or rPCR.

This process deepens the learning of individual program officers while, at the same time, ensuring that others in the organization benefit from it as well. The process generates and captures individual learning in a more dynamic way so that it can be shared collectively.

The most dramatic change introduced with rPCRs is that, instead of a solitary paper exercise, the process is built on dynamic oral interviews between colleagues.

The prefix "rolling" indicates that, rather than a single report prepared at the conclusion of a project, reflective interviews are now conducted at 3 stages of the project: one after its initial design; another roughly at its mid-point, and a third at the end. At stage 1 the responsible program officer is interviewed by the research officer, at stage 2 by the team leader or manager, and at stage 3 by the director of the program area or by the regional director. This ensures that knowledge is shared more broadly in the organization. These interviews are interwoven; the issues addressed are related, and each interview builds upon the earlier ones.

This interconnectedness allows the interviewee to more deeply analyze the issues in order to deepen their understanding of the experience and the lessons they can draw from the project. In order to be validated further, the aggregated lessons identified in the rPCR interviews are periodically triangulated with other sources (e.g., evaluation findings, expert opinion, experiences reported by partners, etc.). This allows the Centre to have more confidence in their significance and transferability.

As the rPCR process requires shifts in the organizational culture, new measures that address the problems of the former system have also been introduced. An array of incentives have been designed to create the conditions whereby interviews are conducted in a timely and quality way. Examples of some of the “carrot and-stick” incentives include the provision of interview technologies, schedulers and "minders" who oversee the deadlines, the listing of the reports in team and individual work plans, red-ribbon awards and links to individual performance appraisals.

Say it in order to know it: the interview process

The core of the new rPCR system is the interactive, open-ended interview. This kind of interaction allows for probing and deepening of lessons. Each interview is framed by specific questions as before, the interviews will deliver factual information and accountability for the management of public funds but now the dynamic, reflective aspect of the exchange acts as a learning experience for both the interviewer and interviewee.

Since many of the interviewees work in different offices around the world, typically the link is made by telephone. The interview is keyed and later edited for the benefit of the written record.

The fact that more staff, at different levels, are responsible for completing and documenting the interviews injects rigour into the process. It helps ensure that the interviews are conducted properly and the reports filed in good time.

The strongest incentive for staff to put time and effort into the new system, however, is the opportunity to exchange substantively with colleagues about issues they are working on and the demonstrated use of the knowledge obtained through the interviews.

Each of the interviews has a unique purpose.

The **stage 1 interview** aims to stimulate the kind of reflection that goes beyond what was considered during the funding appraisal. In particular, officers are encouraged to look ahead and imagine the additional learning that can take place during the life of the project.

The **stage 2 interview** happens mid-way through implementation of the project. This interview follows up on issues raised in stage 1. It focuses on the content and process of the project -- what has gone well, what are the problems, how the project team is working, and so on -- and captures practical lessons that can be applied to projects.

As projects are completed, the **stage 3 interview** serves as the key accountability element. It addresses the results aspects of the project and concentrates on the relative success in terms of objectives met, outputs, and the achievement of outcomes.

Knowledge in action: how rPCR information is used

Processes are in place to encourage wide dissemination and to promote use of the knowledge. An exciting new event was added to IDRC's calendar as a part of the rPCR process called the Annual Learning Forum (ALF) to share the knowledge drawn from rPCRs throughout the organization.

Like the interview process, the ALF echoes IDRC's oral culture by drawing upon the same fundamental idea: that tacit knowledge can be elicited by way of conversation and reflection among colleagues.

The information created by the rPCR process is also used in everyday programming, by staff at all levels. The reports are part of the handover notes when a project is transferred to another officer. They inform comprehensive program reviews such as strategic evaluations and regional and program management reporting. They help in the framing of external IDRC documents such as annual reports, press releases, and public statements by the President.

Result: efficiency and effectiveness

The new reporting process introduces profound changes in the way IDRC operates. The rPCR process demands a fundamental shift in thinking about individual and collective practices that is, it requires cultural change. Reflection and learning are given greater priority and all staff and managers have responsibility for making it happen. To be successful, the implementation of the process requires the support of all staff, and a willingness to actively engage in the process.

The rPCR process will help IDRC strengthen the culture of *reflection* that will increase the learning and accountability of the organization. In the end, much valuable learning will be retained, and IDRC will function more efficiently and more effectively in its support of research for development.