

# **The Large Conference Re-Imagined: Strategies, Dynamics, and Systems for IDRC's Convening Capacity**

Commissioned by IDRC's Evaluation Unit

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## Executive Summary

Vast amounts of funds, effort, time, and different types of resources and energies are invested in large conferences. This does not only refer to the funders or organizers of conferences, but also to the participants who travel across the globe to take part in these events. Concerned about the investments going into these events and wanting to take full advantage of the opportunities they provide to support research for development, the International Development Research Centre (IDRC) commissioned a team of researchers from the Institute of Development Studies (IDS) to study the nature of IDRC's engagement in large conferences, and the related opportunities and challenges.

This report draws on the experience of IDRC's involvement in 15 large conferences as co-convenor and/or initiator. It finds that IDRC has a number of weaknesses that need to be addressed and strengths that could be leveraged in engaging in large conferences, summarized in the table below.

IDRC's Strengths and Weaknesses in Engaging in Large Conferences	
Strengths	Weaknesses
A wealth of institutional knowledge about what works and the learnt capacity to innovate within the system.	A lack of articulated strategic direction, which would facilitate innovation, guide institutional collaboration, and rationalize efforts.
An awareness that large conferences generate significant moments for showcasing or mainstreaming innovative ideas and practices.	IDRC staff and managers do not use planning tools (such as the critical path) strategically, linking activities and events to the Centre's mission.
Flexible practices for engaging with conferences in funding, planning, facilitation and reviewing. This supports opportunities for innovation, which are taken up by some organizers sometimes.	There are few standards across the Centre that would support or encourage innovation in areas critical to maximising the perceived success of conferences.
Awareness across the Centre and its partners of the potential for more systemic learning. This demand for reflexive practice is the first step in building capabilities to manage large conferences more effectively.	Evaluation frameworks still assess conferences as stand-alone events and do not track outcomes over time or in relation to a larger strategy. This is important if IDRC is to make a bolder assertion of the value of large conferences for its global mission.
A strong sense that conferences are not stand-alone events. This comes from a sophisticated understanding of influencing as non-linear and relationship driven.	There are no guidelines to monitor the costs of large conferences.
An awareness amongst a significant number of staff of the diversity of objectives that can come to bear on a single conference.	Staff are not sure how to support their insights about the complexity of conference dynamics and tend to revert to inadequate practice, such as over structuring and reducing the diversity of spaces.

The final section of the report presents suggestions for how the findings and a policy entrepreneurship framework might apply to the key administrative functions as they relate to IDRC's engagement with large conferences. It identifies the need for more conscious planning across the Centre in the early stages of engagement with a large conference to maximize efficiencies and to make it easier for the Centre to monitor the real costs and associated outcomes of large conferences.

# 1 Background

## 1.1 Contextualizing the Study

*–The sheer size, expense, and political and logistical complexity of conferences raise a host of issues and problems that come with bringing people from a wide range of perspectives together to address social inequities and development challenges. This is an ambitious goal and, not surprisingly, governments, the U.N., and non-governmental organizations have expressed frustrations about the process and the outcomes.”*  
*World Summits and Conferences—Grant Making on a Global Stage (2005) R. Nichols and A. Bailey*

What are large conferences? The answer to this question might seem obvious to many, but it is likely that a wide range of interpretations would be given, depending on one’s personal experience of such events. As Haylock<sup>1</sup> points out in a detailed review, a clear and universal definition of large conferences does not emerge from the literature (see box “Defining a Large Conference”).

### **Defining a Large Conference**

For the purpose of this report, we draw upon a working definition of a large conference, set out by IDRC, as an event that provides an opportunity for networking, broadcasting, positioning research and receiving ideas in which research partners are supported by multiple areas of the Centre to participate (i.e. Communications Division, Program Areas, Partnership and Business Development Division, a Corporate Meeting Planner, Senior Management, etc.) We should not limit ourselves to this understanding, however, and it may also be useful to borrow from literature on UN conferences, which suggests that these large events are typified by a certain scale of ambition, expressed in spatial and topical jurisdiction. This offers a variety of options for partnerships in planning, facilitating, and participating in the conferences and has implications for legitimacy.

Vast amounts of funds, effort, time, and different types of resources and energies are invested in large conferences. This does not only refer to the funders or organizers of conferences, but also to the participants who travel across the globe to take part in these events.

Concerned about the investments going into these events and wanting to take full advantage of the opportunities they provide to support research for development, the International Development Research Centre (IDRC) commissioned a team of researchers from the Institute of Development Studies (IDS) to study the nature of IDRC’s engagement in large conferences. IDRC participates in different types of conferences, meetings, and workshops, using a variety of means of engagement—as participant, co-convenor, or initiator. This report draws on the experience of IDRC’s involvement in 15 large conferences<sup>2</sup> as co-convenor and/or initiator. It does not address IDRC’s involvement as conference participant for two reasons. First, the resource investment, as participant, is probably less,<sup>3</sup> because participation involves minimal staff and travel costs, whereas as a convenor the Centre typically mobilizes multiple research partners, research users, and other stakeholders. Second, valuable as such participation may be, it is not the main route through which the Centre leverages the most influence on the form and function of large conferences in the sector.

<sup>1</sup> Laura Haylock authored the Phase 1 report of this study.

<sup>2</sup> The full list can be found in the bibliography of documents reviewed (Annex 3) and the Haylock report.

<sup>3</sup> This is an assumption, as there was no conclusive data on the difference in resource allocation between the various modes of engagement.

This study should not be read in isolation, however, and should be seen as complementary to other work conducted by IDRC on the related issues of capacity development, knowledge management, and policy influence. It is also important to make a distinction between this study and other evaluations that are conducted regularly at the end of conferences. While the latter specifically look at the particulars of each conference, in terms of achievement of stated objectives and the responses of organizers and participants, this study explores IDRC's participation as co-convenor and/or investor in large conferences, looking at the nature of its participation and the potential to assess outcomes as they relate to IDRC's mission and goals.

The primary **purpose** of this evaluation is to

- understand the nature of IDRC's engagement in large conferences;
- identify ways the Centre can expand its understanding and assessment of the results of engaging in large conferences; and
- offer suggestions about how to approach large conferences more effectively by identifying what has been regarded as successful and what has been a source of frustration.

To understand the social returns on large conferences would require an investigation of any catalysing effect the conferences have on research knowledge creation and uptake. IDRC is not well placed to answer questions about this kind of impact at the moment, because the Centre does not have the appropriate evaluation frameworks in place pre-, during, and post-events.

Providing a systemic assessment of the results of conferences is also difficult at this stage, because respondents acknowledged that there is no success criterion or system of assessment in place at IDRC for large conferences. What needs to be developed is a framework for a general assessment of results of *all* conferences. In the meantime, and hopefully as a precursor to a more rigorous framework, it was agreed that the report would focus on understanding the nature of IDRC's engagement, its opportunities, and its challenges.

This report is intended for the internal stakeholder groups within IDRC, and the Centre's longer-term partners who are planning to organize and/or participate in a conference. It is anticipated that the case study would be of interest across the development sector for organizations wanting to develop their own evaluator capacity in this area and contribute to an emerging field of research.

The methodology was not designed to answer questions about whether or not an individual should attend a specific conference, but is intended to support a discussion about if and how the Centre mobilizes its departments to contribute resources purposefully and effectively to engagement through large conferences. If individuals find the content of this report useful as a reflective tool to guide their own professional engagement in conferences, then this may be an added value.

## **1.2 Methodological Plan**

### **1.2.1 Components**

#### ***Literature Review***

The review set out to map existing knowledge from the literature on conferences, to identify the various disciplinary perspectives, and then to discuss the three main identified areas of functions of conferences (policy influence, knowledge creation and learning, and networking). It

then sought to examine how the impact of conferences can be evaluated, depending on the objectives of the conference. Ultimately, the review aimed to examine the approaches discussed in terms of how they fit into IDRC's understanding of social change, the policy process, and IDRC's approaches to learning and evaluation.<sup>4</sup>

### ***Review of Institutional Memory***

This phase of the study assessed the expectations of IDRC program staff, the modalities for engaging in the conferences, and the outcomes and benefits of participating as perceived by the IDRC partners.

This review involved two phases:

1. **Interviews** with more than 30 key IDRC staff—from the Program and Partnership Branch, Communications Division, and Partnership and Business Development Division—for their views on IDRC participation in general, but focusing on the most recent large conferences in which IDRC has participated: (i) the International EcoHealth Forum, Merida, Mexico, December 1–5, 2008; (ii) Decentralisation, Local Power and Women's Rights: Global Trends in Participation, Representation and Access to Public Services, Mexico City, November 18–21, 2008; and (iii) the Global Ministerial Forum on Research for Health, Bamako, Mali, November 17–19, 2008. (See Annex 4 for a list of interviewees.)
2. **Document reviews** of over 25 documents, including communications strategies, evaluation reports, policy briefs, final reports, and trip reports of the above conferences and 12 previous conferences, including those reviewed in Haylock's report. These documents provided very useful insights and served to reinforce or demonstrate how the key issues were exercising staff in their planning and assessment. However, it should be noted that there is relatively little quality documentation that is relevant for a study of IDRC's engagement with large conferences. While there is a great deal of documentation and correspondence about the planning and implementation of the conference proceedings, there is no consistency in the way that strategic decisions are made, communicated, and assessed. Indeed, the Centre's evaluation team appear to have been sufficiently concerned about this issue to initiate a report on the availability of relevant documentation.<sup>5</sup> As a result, there are a number of instances where assessments were inconclusive because of a paucity of relevant data.

### ***Ethnographic Study***

The data collected in the review of institutional memory was predominantly cognitive—based on recall. Cognitive data are subject to a number of filters and could provide us with misleading conclusions.<sup>6</sup> The ethnographic study, by contrast, focused on collecting behavioural data to capture the dynamics of a variety of stakeholders in large conferences.

The ethnographic study used the live conference case study of the International EcoHealth Forum, held in Mexico between December 1st and 5th, 2008. In order to assess this

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<sup>4</sup> See Annex 5 for the full literature review.

<sup>5</sup> *Evaluability Assessment of IDRC's Participation in Large Conferences*, Laura Haylock, IDRC Evaluation Unit, 2007.

<sup>6</sup> Social network analyst Holger Illi reports that studies have found 50 per cent of cognitive data to be misleading. (See Annex 3: Documents Reviewed.)

conference as a case study, we had to explore three phases (pre-, during and post-conference). A full description of the methodology and the ethnographic narrative can be found in Annex 6.

### **1.2.2 Process**

The workflow of the study was iterative. The evaluation team began with a Phase 1 report by Laura Haylock (Professional Development Awardee with the Evaluation Unit), which was based on desk reviews of background documents and interviews with staff and partners, and a focus group discussion. The purpose of the Phase 1 report was to synthesize and aggregate the process and intention of the Centre's participation in large conferences and to tease out the key lessons from this participation. This report provided a "top-line" cognitive analysis<sup>7</sup> from IDRC, essentially identifying some lessons and key issues for subsequent phases of the study to address more closely.

A further literature review was then conducted to inform the ethnographic study and frame the key issues. The ethnographic study provided an opportunity to collect the majority of the behavioural data.

Another phase of cognitive data collection then occurred, with follow-up interviews with staff and reviews of further documents to validate or contextualize what was emerging from the ethnographic case study.

## **1.3 Methodological Limitations**

While the ethnographic study was an attempt to minimize the risk of bias that emerges from data that is based on individuals' recollection, the reviewers cannot guarantee that this was avoided completely. In the absence of the Centre having a larger framework for monitoring investment and outcomes of conferences, the evidence remains largely anecdotal. As is discussed in Section 3, a broader framework is crucial for supporting partners and programs to maximize the opportunities of larger conferences.

The ethnographic study required two researchers to maximize their exposure to participant interactions during the event, and additional staff interviews were used to put these observations and responses into context. Since this was one large conference (with over 500 participants) among several that IDRC had organized over a 12-month period, we do not want to overstate the representativeness of this case study.

The practical implications suggested in this report were developed from extended discussions with organizers, participants, and team members within and outside IDRC, drawing on the experience of respondents through the institutional review and the ethnographic study. The evaluation team provided guidance as to how these practical suggestions might be organized to fit into IDRC's strategic operations. However, during the validation exercise, user groups indicated that their ability to respond to recommendations would depend on senior management's commitment and priority setting. In this regard, the review team could have spent more time with senior management.

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<sup>7</sup> Cognitive data is based on recall and forms the basis of the "review of institutional memory" component of the methodological plan; behavioural data is based on observation and forms the basis of the "ethnographic study" component.

## 2 Key Findings

IDRC has gained substantial experience from participating in conferences in different ways. The evaluability study identified 12 conferences (over a 5-year period) of a sufficient scale to warrant further analysis. The evaluation team also recognizes that IDRC staff exert deliberate effort—through the way they work, their evaluations, and the studies they commission—to become more reflective and learn from past experiences.

In this regard, it is difficult to suggest that the Centre as a whole does not have a progressive approach to conference planning, delivery, and assessment. However, custom and practice are fairly uneven across the Centre—for instance, different events have different documents reflecting differing planning and assessment processes even within the Centre—and reflect a lack of strategic decision-making, planning, and evaluation processes for engagement in large conferences. This is, perhaps, the overriding key finding of this study, and is discussed in more detail in Section 3 –Strategic Implications for IDRC.”

This section will explore current thinking on assessing large conferences—including the implications for practice or policy in convening—and then compare this to IDRC’s own capacity or experience. It examines three critical factors that contribute to the success of large conferences: the purposes and objectives of conferences, the participants’ roles and expectations, and conference dynamics and how they are managed.

### **Key Finding: Strategic Framework**

While IDRC demonstrates a progressive approach to conference planning, delivery, and assessment, it lacks a strategic framework for decision-making, planning, and evaluation. This lack of a strategic framework for engagement in large conferences has contributed to:

- uneven custom and practice in planning and assessing large conference participation;
- an inability to assess impact and outcomes based on established criteria; and
- a lack of data and documentation needed to monitor and assess the cost benefits of large conferences.

### 2.1 Purposes and Objectives of Conferences

Although large and small conferences might share some common objectives/functions—such as showcasing results, knowledge transfer, mutual learning, and creating new partnerships—large conferences could be more effective than small conferences in certain areas, especially in influencing policy, promoting new concepts, networking, and expanding constituency around certain issues

because of the scale they are able to achieve. This section explores the practical implications for this scaling up, based on concepts identified in the literature and empirical examples.

### **Key Finding: Purpose and Objectives of Conferences**

The underpinning goal and the attendant objectives are fairly consistent across conferences convened by the Centre and focus on policy influence, and knowledge sharing and uptake. However, the challenge is to articulate and communicate these goals or purposes clearly and consistently across teams and different levels of the organization.

However, it is common for conferences to have several objectives. What is notable is the extent to which the underpinning goals (policy influence, and knowledge sharing and uptake) and the attendant objectives (discussion platform, networking) are consistent across conferences convened by the Centre. The examples in Evidence Window 1 are fairly typical for IDRC.

**Evidence Window 1: IDRC Objectives for Convening Conferences**

**XVI International AIDS Conference (Toronto, Canada, 2006):** IDRC had four articulated objectives: to increase IDRC and partners' visibility, to share results of IDRC-supported research, to provide opportunities for IDRC partners to network and build alliances, and to provide a forum for substantive reflection and debate. *Report on IDRC's Participation at the XVI International AIDS Conference, Toronto, Canada, 2006.*

**International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):** The goal of the Forum (as a whole) –was to provide a platform for discussion of the ecosystem approach to human health, the evidence from the field, and the relevance of the approach to improving health and well-being. The forum would also offer the opportunity for researchers, policy makers, practitioners, and civil society representatives from around the world to share knowledge, and for institutions to consider strategies for a way forward." *Evaluation Report – International Forum on Ecosystem Approaches to Human Health, Montreal, May 2003*

However, it is important that the Centre be clear, consistent, and reasonable in its expectations of a conference. Evidence Window 2 provides examples of the value of having clear objectives that are shared across teams and different levels (strategic and operational) of the organization. It also provides an example of the stress generated by objectives that are ill conceived or poorly articulated. The challenge is to have a central goal or purpose so that the objectives are coherent and there is a framework to guide staff towards decision-making and innovation.

**Evidence Window 2: IDRC Aims for Past Conferences—Good Practice and Areas for Improvement**

**The Fourth World Water Forum (Mexico City, Mexico, March 2006):** –We were realistic about the actual learning opportunities that the forum would present, given the scale and broad scope of the program. Our expectations revolved around profiling our partners first and secondly around providing space for networking. (A distant third was actually expecting substantial learning from the sessions themselves!) ... A few examples: the booth was conceptualized to be a place less encumbered by publications and documents but that offered lots of sitting space to be used as a place for small meetings and discussions, and a strategic list of invitees was drafted for our reception to ensure we had the time and space to meet with other participants who were potential partners." (p.12) *Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006*

**Third Edition of the UN-Habitat World Urban Forum (Vancouver, Canada, June 2006):** –IDRC's involvement in WUF3 aimed to: enhance the Centre and its partner's visibility, raise public awareness of urban agriculture and environmental risk management (evidenced through media coverage—over forty news items), facilitate networking, and strengthen capacity. (Follow-up interviews confirmed the strong value partners placed on the preparatory workshops and the opportunity to work with IDRC to refine their messages and hone their presentational skills. Various partners indicated the training would have positive long-term impacts on their work.)" (pp.1–2) *IDRC-Partners @WUF2006 – Report on IDRC's Participation in the Third Edition of the UN-Habitat World Urban Forum, Vancouver, Canada, June 2006*

**Global Knowledge Partnership 3 (Kuala Lumpur, Malaysia, December 2007):** –Wavering from top levels [at IDRC] trickles down and the messages get confused..." (IDRC staff) *Strategic Evaluation of IDRC's Participation in Large Conferences – Phase One Background Paper – How and Why IDRC Participates, by Laura Haylock, IDRC, Evaluation Unit, July 2008*

## Evidence Window 2 continued

**Global Knowledge Partnership 3 (Kuala Lumpur, Malaysia, December 2007):** “While some staff members were inclined towards a more frugal platform, others emphasized the importance of the ‘sizzle’ requiring a larger financial commitment. This difference in opinion caused challenges that, according to one IDRC staff, were not reconciled ... The priority of the ‘sizzle’ also created low expectations, with some staff and partners, towards the potential success of the conference. According to the Action Team focus group, IDRC, at all levels, seemed ‘hot and cold’ towards GK3 and, at times, there was a certain amount of negativity towards the Centre’s participation. During the planning phase, the Action Team created weekly meetings with ICT4D staff to try and alleviate some of this negativity and build momentum for the conference.” *Strategic Evaluation of IDRC’s Participation in Large Conferences—Phase One Background Paper—How and Why IDRC Participates*, by Laura Haylock, IDRC, Evaluation Unit, July 2008

### 2.1.1 Policy Influence

While there may be several identified functions for large conferences, policy influencing still emerges as an overarching goal for many of these events. Significantly, this is not just true for IDRC and other conference organizers, but also for conference participants, including academics, practitioners, NGOs, students, and policy makers. In fact, the other identified functions of conferences—such as knowledge sharing, showcasing results, and networking—were seen by many respondents as ways of furthering policy influence.

#### Key Finding: Policy Influence

Policy influencing emerges as the overarching goal for all of the large conferences studied; other identified functions (such as knowledge sharing, showcasing results, and networking) were seen by many respondents as ways of furthering policy influence.

Conferences are often seen as part of a larger strategy for influencing change. However, evaluations rarely address this aspect and conference planning, resourcing, and message framing do not always make this connection explicit.

Where policy influencing is concerned, it should be noted that there are different types of policy spheres and certainly not all are in national governments. In addition, the objectives of policy influencing can cover a number of outcomes, including regime change, broadened horizons, and enhanced institutional quality.<sup>8</sup> This report suggests ways to take advantage of the large conference format to deliver on these and associated outcomes. (See box on “The Mechanics of Brokering Research and Policy.”)

#### The Mechanics of Brokering Research and Policy

How, then, does the nature of large-scale conferences help shape policy? Tepper synthesizes the potential benefits of large-scale conferences into seven key opportunities. Large conferences can help shape policy by: helping to frame or reframe a problem; calling attention to new and important research; creating and sustaining communities of experts; softening up audiences for a new idea or proposal; sustaining the momentum for an idea during political fallow times; fostering policy transfer and knowledge uptake; and helping policy entrepreneurs to test ideas, develop meaningful and influential contacts and networks and predict or plan for the opening of future policy windows (Tepper 2004: 540). Tepper argues for the importance of a well-timed meeting for this to happen (2004: 529–530), which resonates with much of the literature on the policy process and the importance of strategic opportunism (Perkins et al. 2009).

<sup>8</sup> See “Capacities, Contexts, Conditions” Fred Carden (2005) [http://www.idrc.ca/uploads/user-S/12194969291Capacities,\\_Contexts,\\_Conditions\\_The\\_Influence\\_Of\\_IDRC\\_Supported\\_Research\\_On\\_Policy\\_Proces.pdf](http://www.idrc.ca/uploads/user-S/12194969291Capacities,_Contexts,_Conditions_The_Influence_Of_IDRC_Supported_Research_On_Policy_Proces.pdf)

Influence as a concept is very broad and can be interpreted in different ways and assessed according to different dimensions. Indeed, there is no consensus across sectors about what to measure.<sup>9</sup> In the first half of 2008, the Institute of Development Studies (IDS) ran a series of seminars on influence, in which each of the research teams presented their understanding and approach to research influence.<sup>10</sup> The range of understandings presented at these seminars illustrated the multiple ways the concept of influencing can be understood and approached. According to Carden (2004) and Neilson (2001), IDRC defines research influence as the influence on public policy through “expanding policy capacities; broadening policy horizons; affecting policy regimes; and developing new policy regimes.” However, this is not a static view and IDRC tries continuously to revise and explore the manner in which its sponsored research feeds into policy and knowledge management (Stone 2003), and reflects on its conceptualisation of influence in different ways.

In the literature, Tepper (2004) deserves special consideration because the concerns and language he uses resonate with the IDRC nexus of agenda-setting, policy implementation, and capacity support, even though his work is expressed focused on U.S. domestic policy. His “strategic fora” are interdisciplinary and cross-institutional, unlike many of the other typologies considered in the literature on large conferences.<sup>11</sup> In effect, his work advances the notion of a policy entrepreneur with theories of policy transfer (between countries) and knowledge uptake (at both individual and institutional levels). Policy transfer, he argues, is unlikely without face-to-face dialogue between policy makers, and policy makers are more likely to act on new research ideas when presented with them in person (2004: 532–533).

In all three stages of the review for this study, it became clear that neither the majority of the literature on large conferences nor IDRC staff subscribe to the idea of a direct causal connection between these events and change or policy creation. Nonetheless, some scholars argue that conferences can be more effective in influencing policy if they are designed in a way that maintains follow up (Lavis et al. 2005; Tepper 2004; Klein 2003; Ginsburg and Plank 1995). This wariness of a linear Newtonian model of causality is significant, as it implies the need to draw more consciously on alternative sets of concepts, such as complexity theory, in conference planning. Conferences are deemed more effective at influencing policy when they are open-ended with sustained follow up.<sup>12</sup> For instance, a strong link between large conferences and policy influence is indicated only if conferences are not seen as stand-alone events, but as part of a series of integrated efforts. These include well-planned follow-up activities and efforts to promote an evidence-based culture among policy makers.

Significantly, all of the conferences reviewed in the sample had documentation to suggest that they were seen as part of a larger strategy. Similarly, respondents in interviews placed a high value on recognising that. However, these “ongoing strategies” had different levels of institutionalisation. In some cases, it was an individual or a small group of individuals who conceived of some continuity around events and built this into their work plans. In others, there was anticipation of follow-up at local levels, and the hope—reasonably—that the local partners would flesh out the strategy and objectives. In some cases, conferences became part of a

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<sup>9</sup> Organizational Research Services, *A Guide to Measuring Advocacy and Policy* (2007 p.2).

<sup>10</sup> *Making Science of Influencing: Assessing the Impact of Development Research* IDS Working Paper 335, September 2009

<sup>11</sup> The full typology can be seen in Annex 5: Literature Review on Large Conferences.

<sup>12</sup> This is reflected in a number of recent review documents on the sector for instance the DFID Working Paper: Research Communication  
[http://www.research4development.info/PDF/Outputs/Consultation/ResearchStrategyWorkingPaperfinal\\_communications\\_P1.pdf](http://www.research4development.info/PDF/Outputs/Consultation/ResearchStrategyWorkingPaperfinal_communications_P1.pdf)

series with a shared thematic concern (and title) such as EcoHealth. While programs recognize IDRC-supported conferences as being part of a larger strategy, to varying degrees, the evaluations rarely address this aspect and treat them as one-off events. .

There are a number of instances where high-profile political speakers had a significant impact in gaining the attention and support of policy makers. However, these high-profile figures come with their own set of issues—the protocol, the tight security, and even controlling and “hijacking” the agenda—creating additional bureaucracy for IDRC staff and their partners. Indeed, interviews revealed that both researchers and organizers are often frustrated with this activity. The frustration of some researchers comes from their views and expectations of the conference, which are the same as those they hold for smaller-scale conferences: the opportunity to gain new knowledge, have room for meaningful discussions, and connect with experienced researchers. As a result, they are disappointed when they realize that, as one participant said, “it is no longer our conference, but that of the policy makers,” and that they have very little room to achieve what they came for. The frustration of the organizers comes from their feeling of losing control over the event and the agenda, which is also related to their concern about meeting the expectations of the rest of the participants.

The contrasting perspectives from Evidence Window 3 speak to the importance of framing activities and objectives for conference stakeholders. Tepper and others, who write from the perspective of policy entrepreneurship, would suggest that the engagement of such high-profile figures could be a crucial symbolic act of communication, presenting a frame for a policy innovation and attracting the attention of a key policy audience. Examples of this include the Global Ministerial Forum on Research for Health in Bamako in 2008, where a number of public figures attended, or the decentralisation conference in 2008 where the Mexican First Lady attended the first day of proceedings. This symbolic objective may be quite separate from the other objectives of knowledge mainstreaming and network building, which may be priorities for some of the delegates and equally important to the business of policy brokering, but require a different communication process and sometimes different audiences. Policy influencing with high-profile figures uses different processes, depending on the objectives and the trade-offs that one is prepared to make.

#### **Evidence Window 3: Involving High-Profile People**

***XVI International AIDS Conference (Toronto, Canada, 2006):*** “Invite a famous personality to moderate or speak at a session—this often guarantees a large turnout as witnessed at the International Aids Conference (2006) and other conferences. The final session was actually a session that was part of the main conference agenda and was moderated for Stephen Lewis thereby attracting over 500 people. This is recommended only if the value added and impact would be much greater and if it would enhance the session. Needless to say, this has to be weighed against the time required to communicate and liaise with a notable personality.” (p.27) *Report on IDRC’s Participation at the XVI International AIDS Conference, Toronto, Canada, 2006*

***The Fourth World Water Forum (Mexico City, Mexico, March 2006):*** “For example, the dinner hosted by WaDImena was a great opportunity to talk to Jordan’s new Minister of Environment in an informal way, which could lead the way to potential future policy-influence. Specifically, the social event and the space provided by the booth provided a venue to deepen discussions and further connect with these agencies.” (p.10) *Report on IDRC’s Participation – The Fourth World Water Forum, Mexico City, March 2006*

## Some Practical Implications<sup>13</sup>

- It is important to consider the conference event within the broader context of a communication or influencing strategy. This extends the workflow before the conference and helps to identify other meetings that might be needed and follow-up activities and outputs. For IDRC, it would raise questions about the value of engaging with a one-off activity. As the examples in Evidence Window 2 suggest, however, this is less of a problem for IDRC, although it might be useful to look at making these considerations more explicit in program decision-making.
- The examples in Evidence Window 2 demonstrate that the ability to manage a diverse set of objectives is crucial to any large conference. A large conference itself might be seen as a series of events constructed around a theme—each with a unique audience, set of processes, and objectives. This plurality of events in a common space is perhaps the most significant difference between large conferences and smaller conferences. This is a useful way to manage the trade-offs, i.e., what to allow and for whom.
- In this respect, it is important to be clear about the dynamics of the conference and to convey this to the invited participants (see Section 2.3 on conference dynamics). Participants need to understand that there will be particular spaces with specific communication and influencing or networking agendas.
- As crucial as it is to invite high-profile policy makers to these events, it is equally important to have an interested and relevant audience listening to what they say, or at least witnessing their presence or input.

### 2.1.2 Showcasing Results and Mainstreaming an Approach

Showcasing results and mainstreaming an approach are different in nature and purpose. Showcasing results could be important for an already existing and acknowledged approach, where IDRC is trying to show its contribution to this approach.

Mainstreaming is more appropriate for a new approach, like EcoHealth, where IDRC (or its partners) is trying to (as described by some respondents) “put its stamp on it.”

There is no specific set of activities inherently more appropriate for either objective. Both can be achieved through a variety of means—from building one-on-one connections to convening large events.

**Key Finding: Showcasing and Mainstreaming**  
IDRC approaches conferences as being temporary spaces where interpretations are negotiated, agendas set, and appropriate methodologies defined. As temporary knowledge communities, conferences necessarily include heterogeneous groups of participants; however, this multi-dimensionality is not always addressed or facilitated by IDRC in conference activities and spaces.

There is a body of literature that relates to conferences as spaces for *knowledge creation and learning* (Wiessner et al.; Graham and Kormanik; Jacobs and McFarlane; Aiken). Such literature highlights the role of conferences in scientific inquiry and the process of conducting and

<sup>13</sup> Some of these practical implications in the Key Findings are expanded for IDRC’s specific organizational context in Section 4.

resolving scientific controversy. Conference spaces allow for particular interpretations of research findings, closure mechanisms for reaching consensus, and exposure to wider social structures and processes. In this regard, conferences can be seen as temporary communities of practice, or knowledge-building communities—negotiating interpretations, setting agendas, and defining appropriate methodologies (Jacobs and McFarlane 2005). This resonates strongly with practice in IDRC. (See Evidence Window 4.)

#### **Evidence Window 4: A Venue for Building Communities of Practice**

##### ***International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):***

–There was a global audience and we all realized we are not alone in our own corner but that there was a community of people that were working on EcoHealth issues.”

–Although for some interviewees the Forum still hasn’t changed their perceptions about the approach, it was considered an excellent opportunity to gather the EcoHealth community and build the knowledge of the approach together. Most interviewees felt that this event created a network for strengthening the community of practice, helping the sense of belonging to the community.” (p.10)

Some participant and organizer quotes on this point:

–*It was a] wonderful ground to share my knowledge and learn to develop the EcoHealth approach with community participants.”*

–*Look forward to see the spirit of the forum manifest in a future community of practice, maintaining participation and dialogue.”*

–*The success was having all these people together, feeling you are not alone. It built incredible strength.”* (p.10)

One key follow-up activity that came out of the conference was the creation of a community of practice. The creation of this community of practice was based on the notion that the forum was not a stand-alone activity, but rather a means to develop the EcoHealth Program Initiative and the community of EcoHealth practitioners. *Strategic Evaluation of IDRC’s Participation in Large Conferences—Phase One Background Paper—How and Why IDRC Participates*, by Laura Haylock, IDRC, Evaluation Unit, July 2008

However, Jacobs and McFarlane recognize that the “embeddedness” of scientific knowledge could conceal multiple interpretations that have very weak potential to emerge. This view is supported by Graham and Kormanik (2004) who, from their position as practitioners of human resources development, express their frustration that the interaction between researchers and practitioners is becoming confined to presentations of complex scientific research followed by brief question-and-answer sessions, which do not provide enough room for an actual dialogue.

The literature supports the conceptual role of conferences in facilitating an interface between influence, knowledge building, and capacity building, which is so crucial to the IDRC mission. However, in practice, there is a need to make a distinction between acquiring an awareness of an approach and gaining in-depth knowledge about it. Understanding this distinction, allows organizers to be clearer about the trade-offs that some organizational decisions entail. It is about facilitating what McFarlane argues are the negotiations of interpretations, agendas, methodologies, facts, and so on that characterize these temporary communities at conferences.

The point here is that the larger the participation at a conference, the less likely it is that the community of practice will be homogenous. As a result, tiers of participants are created, with different levels of orientation to the knowledge and, indeed, varying interests and political views of the knowledge innovation that is on show. This is underscored by the diversity of knowledge functions found in conferences and described above. There was conflicting evidence about the extent to which IDRC is supporting this multi-dimensionality in the networks and communities.

Many respondents acknowledged this multi-dimensionality in interviews, including during the EcoHealth ethnographic study, but how efforts to address such knowledge diversity were facilitated in the conference space was inconsistent, as seen in Evidence Window 5 below.

<b>Evidence Window 5: Tiers of Participants</b>
<p><b>The Fourth World Water Forum (Mexico City, Mexico, March 2006):</b> –This forum provided grassroots organizations and authorities a networking platform to showcase local ‘best practice cases’ and share them with the international water community.” (p.7) Five students –also participated in week-long events of the Youth Forum: presenting their findings, dialoguing with students from around the world, and participating in fun, capacity building events and activities.” (p.8) –Students were able to converse and debate with other forum attendees and participants.” (p.8) –The time spent engaging with other attendees gave students a great deal of confidence ... They gained confidence in speaking (often in English) to strangers, gained experience answering possible questions about their program, and in some cases even influencing donors to fund the programs’ phase two.” (pp.15–16) <i>IDRC-WESC Final Technical Report – World Water Forum, Mexico City, March 2006</i></p>
<p><b>Third Edition of the UN-Habitat World Urban Forum (Vancouver, Canada, June 2006):</b> –It is important to note, however, that in the more in-depth interviews carried out after WUF, some participants were sceptical about the networking benefits afforded by WUF. While those involved in the ‘young researchers’ panel were very positive about the networking opportunities, others indicated that the schedule was too busy to allow for in-depth conversations with potential partners, beyond IDRC-supported speakers, and believed that IDRC missed opportunities to promote ‘inter-network networking’ and strategic links between IDRC partners and other Canadian organizations.” (p.22) <i>IDRC-Partners @WUF2006 – Report on IDRC’s Participation in the Third Edition of the UN-Habitat World Urban Forum, Vancouver, Canada; June 2006</i></p>

It is not realistic to expect that a 15-minute presentation, followed by a five-minute discussion later in the session, will be effective in animating a diverse range of participants. Such expectations usually result in disappointment for both the presenter and the participants and become even more frustrating when a large number of presentations are planned in a large conference. Such views emerged clearly in the ethnographic study and in a number of interviews with IDRC staff involved in a variety of conferences. On the other hand, organizers reported feeling exasperated at the number of “fringe” events that participants might want to organize. While organizers often felt overwhelmed, participants wanted a lot more endorsement of these activities. However, organizers have an opportunity to recognize and facilitate the various communication and knowledge needs of a large number of participants as opposed to finding themselves in a power struggle for control with delegates. Recognizing that large conferences should be able to respond to diverse needs and emergent processes can lead to less stress and more expressed satisfaction for both organizers and delegates (see Section 2.3.2 Recognizing Conferences as Emergent Spaces).

**Key Finding: Democratic and Innovative Approaches to Knowledge Sharing**  
 IDRC has demonstrated some innovative and non-conventional approaches to knowledge sharing at conferences, which are highly appreciated by participants. However, they are not always facilitated effectively and there are no institutional guidelines for identifying, managing, and/or scaling out these activities.

There is another concern here, about managing democratic approaches to knowledge sharing. Many participants find it difficult to justify attending events if they are not presenting. This difficulty arises for different reasons, such as problems in securing funding to cover their

expenses; but even those who have available funds usually need a good rationale to leave their university or organization for a week. It becomes even more challenging for organizers to make space when participants insist on a particular format for their presentation, declining to attend otherwise (if, for example, they are only invited to participate in a poster session). This means that not only do participants belong to a diversity of communities of practice, but that they will have varying expectations about how that community is represented and its views and positions expressed. The challenge is to allow for different communities of practice to engage amongst themselves in the format they deem most appropriate—instead of attempting to standardize all engagement in response to issues like logistics or our own ideas of equity.

### **Some Practical Implications**

- It would be useful for organizers to create differing tiers of knowledge orientation and mainstreaming. For instance, some sessions could focus on the rationale behind a particular approach, including the advantages and framing of the problem, while others could focus more explicitly on the scientific details of the issue. Essentially, it means allowing more space explicitly for a diversity of knowledge transfer functions afforded by the conference. IDRC has described a variety of innovations in its conferences over the years—see, for example, Evidence Window 5 on youth engagement. However, it would appear that some of these innovations have not been facilitated very effectively and there are no institutional guidelines for identifying and managing these opportunities.
- In general, traditional presentations need not be the default format of the conference. Various communities of practice may want to express themselves differently. The value of not having formal presentations at all, and only open discussion and participatory approaches, is that non-presenting delegates will not feel lower in the conference hierarchy than those who are presenting. In all conferences explored in this study, even the slightest attempts to introduce non-conventional formats for the sessions were highly appreciated.
- The review of institutional memory, both in Phase 1 as well as in the ethnographic study, strongly suggests that a local consultant acting as a “bridge” between the conference venue and the external conference organizers is useful. Allocating resources and time for such a consultant is important.
- In order to bridge the gap between researchers and practitioners at conferences, Graham and Komanik make a number of practical suggestions. These include changing the structure of conferences to allow more time for information interaction; encouraging any speakers to include a minimum amount of deliberation on practical implications of their research; and training for chairs to facilitate discussions (2004:392). Evidence Window 6 provides another example of IDRC innovating in this area, but there is no evidence that the Centre has mechanisms in place to scale this out.

#### **Evidence Window 6: Non-Conventional Presentations**

**XVI International AIDS Conference (Toronto, Canada, 2006):** *“The Global village booth was a great node for networking at the conference. Satellite sessions allowed researchers to begin interacting on a variety of issues from the ‘I’ve done my research. Now what?’ stage—this is terribly meaningful and useful collective contemplation, in a predominately supportive discussion environment,”* said one panellist consulted for the evaluation.” (p.26) *Evaluation Report on IDRC’s Participation at the XVI International AIDS Conference, Toronto, Canada, 2006*

### 2.1.3 Networking and Partnerships

Conferences have also been identified as spaces for networking opportunities. Similar to the literature on policy influencing, the literature on networks and network analysis is very multi-dimensional.

The literature on women's conferences views them as places for building global social networks (Schechter 2005; Chen 1995; Davis 1996; Martens 2000). Some studies also provide evidence that 60 per cent of conference participants end up conducting collaborative research, which could be seen as an outcome or indication of networking activities (Aiken 2008). In the field of business, Taylor (2005) and Cumbrowski (2008) argue that conferences provide networking opportunities for face-to-face dialogue, which is crucial to the success of participants' work.

#### **Key Finding: Networks**

Large conferences offer unparalleled opportunities for networking and should be considered an opportunity cost of not having a conference. While IDRC has provided innovative ways for participants to network, it has also sometimes failed to facilitate these networking needs by over-scheduling conference events and/or marginalizing related networking opportunities.

Networking in the context of this study is understood in different ways, from the formal, organized sense of established communities to the very loose, informal sense of acquaintanceship or coexistence in the conference space. There is considerable evidence from various conferences that researchers felt supported for this diverse networking.

Granovette (1973)<sup>14</sup> observes that in order to develop networks, ideas have to move away from the static analysis that observes a system at one point in time, by not only looking at obvious strong connections and established communities, but also at the weaker links between interdependent actors that could develop into bridges. These "weak links," he argues, bridge gaps between social entities, tend to be low maintenance, and are valuable for information searching. Reinforcing strong connections is also important because it builds mutual understanding of the conventions of language and knowledge, which make sharing complex information easier.

The fieldwork, ethnography, and interviews in this study confirmed that large conferences are unmatched opportunities for networking. On several occasions, networking was presented as the most important reason for people to travel, even when their expectations of the policy-influencing or knowledge-building agendas were ambivalent or blatantly hostile. Evidence Window 7 gives two examples of the valuable networking and influencing opportunities that large conferences provide through their particular convening power.

#### **Evidence Window 7: Opportunities for Networking in an International Arena**

***The Fourth World Water Forum (Mexico City, Mexico, March 2006):*** The Wadi Environmental Science Centre (WESC), with UN Global Environment Fund, partnered to conduct a water education and awareness program. The program culminated in the students attending and presenting their work at the World Water Forum. IDRC supported ten students and three staff/chaperones to represent Egypt at this major international conference. The forum allowed a public arena where the students "were empowered to dialogue with Egyptian ministry officials and appeal (to) the ministry for national policy changes." (p.1) *IDRC-WESC Final Technical Report – World Water Forum, Mexico City, March 2006*

<sup>14</sup> Granovette, M.S. (1973) 'The Strength of Weak Ties', *American Journal of Sociology*, 78: 1360-80.

**EcoHealth Forum (Merida, Mexico, December 2008):** A Southern researcher explained how, through being at the EcoHealth conference, he was able to meet with a minister from his country and have a discussion with him, a situation of great value to him that would have never been possible if they were both back in their own country. There were several other examples, such as that of students having opportunities to meet prominent professors in their fields, and meetings that led to co-publishing ventures. Although these, taken at individual level, might appear to be relatively small gains, if replicated many times through the experience of multiple participants at a large conference, they quickly gain greater significance for the perceived overall value of the event. *Ethnographic Study of A Large Conference, Eco-Health Forum, Mexico 2008*

To appreciate the value of networking fully requires a methodology and instruments that can track the development of relationships over space and time, as well as the social return on any opportunities arising from the relationships. Aiken's longitudinal study, which followed a sample of participants from the Keystone Symposia over 18 months, showed that a large percentage (up to 60 per cent) of attendants at scientific conferences had new research collaborators as a result of attending the conference (Aiken 2008).

However, the potential for networking and partnering opportunities could be missed because of the limited time and space allowed for them. Although networking is usually stated as part of the objective of the agenda, many respondents felt that numerous presentations and packed schedules do not provide enough room for meaningful engagement. It is also important to stress that networking is not a process that occurs only during the conference. There are also opportunities for networking in planning and follow-up activities. In the conferences that were included in the study, it would appear that organizers and facilitators often did very little to facilitate the networking needs of participants as they emerged around the conference. Evidence Window 8 below provides three typical illustrations of networking opportunities glimpsed but largely unrealized.

#### **Evidence Window 8: Networking Space**

**World Summit on the Information Society (WSIS) – Phase II (Tunis, Tunisia, 2005):** –What participants liked least was the pressure of the competing events and the overwhelming numbers of people. ‘There were too many sessions to stay focused! I felt like a headless chicken,’ said one participant, echoing the sentiments of many others.” (p.7) *Evaluation Report, World Summit on the Information Society (WSIS) – Phase II (2005, Tunis)*

**XVI International AIDS Conference (Toronto, Canada, 2006):** –The sentiment shared by almost all partners who responded was that while the International Aids Conference (IAC 2006) provided access to a wide variety of activities relating to HIV/AIDS, at political, social, economical and medical levels, it was too large and overwhelming to allow for structured discussions and follow-up with other researchers.” Quote from one panellist responding to evaluation questions: –*think the conference is so huge that it is impossible to use it as a networking and new idea-finding venue.*” (p.23) *Evaluation Report on IDRC's Participation at the XVI International AIDS Conference, Toronto, Canada, 2006*

**The Fourth World Water Forum (Mexico City, Mexico, March 2006):** –We found our partners much more interested in networking amongst themselves and their regions on topics of interest than in liaising with other regions. This made sense, as most had their ministers in town and there was little overlap between their regional interests. In the future, we may try to facilitate more intra-regional networking with ministers and other agencies, rather than inter-regional networking events.” (p.12) *Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006*

### **Some Practical Implications**

- If coffee breaks, lunchtimes, and social functions are to be used for informal networking, then these should be facilitated by providing sufficient time and ice-breaker activities. It is also important to conceive of these events as part of the conference—as opposed to fringe activities.
- Networking should have two objectives. The first should be to reinforce bonds in the communities of practice; the second to strengthen links between stakeholder groups. This second objective is particularly important for IDRC to include in conference planning processes because it needs to be considered as one of the opportunity costs of not having the conference.
- Sometimes it is not enough just to provide open time and space. Organizing some relatively structured spaces could initiate productive networking activities. For example, the EcoHealth Forum provided time and space for networking and partnering activities—the ‘partnership paradise’<sup>15</sup>—yet this was not a major hub of networking because it appeared marginal and relatively inaccessible. However, other innovations have demonstrated the value in thoughtful facilitation. (See Evidence Window 9 below).

#### **Evidence Window 9: Planning for Networking Space and Time**

**World Summit on the Information Society (WSIS) – Phase II (Tunis, Tunisia, 2005):** “The Sandbox [a space dedicated to networking and small meetings] was an open area of the pavilion, where our research partners from the south shared their experiences in an interactive manner.” (p.2) Rating of IDRC booth activities: Sandbox was the most popular at nearly 9 out of 10. (p.2). When asked what element of the IDRC-organized activities at the event should be maintained, respondents indicated that the two most important elements were a) the sandbox activities in the booth, (p.5) and b) partner presentations and partner networking. (p.8). The event showed IDRC’s use of a range of activities: quality events, workshops, roundtables, dialogue and networking opportunities, launches of events and publications, official announcements; often through booth activities such as a speakers’ corners, online quizzes, telecentres.org blogs, sandbox activities, plasma screens, etc. *Evaluation Report, World Summit on the Information Society (WSIS) – Phase II (2005, Tunis)*

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<sup>15</sup> A ‘partnership paradise’ space was made available every day at lunchtime, when participants could meet and discuss any issues of interest. Although this was an open space, not many people engaged – including those who had committed themselves by suggesting topics for discussion. Perhaps this was because it was tucked away in one of the hotels and was not well advertised. However, some people used this space for different purposes, such as organizing private meetings or preparing for panel discussions.

## 2.2 The Role of the Participant

It is common knowledge that different participants have different objectives for participating in conferences and may make use of the space very differently. These objectives may be congruent or conflicting, or just different from those intended by the organizers who invite them. It is the participants' subjective assessment of the quality of relationships that often emerges as the common marker of success. This is supported by analysis of the conferences studied.

### Key Finding: Participants Roles and Objectives

The participants' subjective assessment of the quality of relationships is a common marker of a conference's success.

However, an analysis of participants' roles and motivations featured very little in IDRC's planning and delivery of conference activities.

### Evidence Window 10: Participants' Expectations

**The Fourth World Water Forum (Mexico City, Mexico, March 2006):** "The most ambitious participants wanted to use the WWF4 as a platform to influence better policy for water conservation and management. Others expected to develop further knowledge in specific topics, through attending sessions of personal interest. Moreover, exchanging experiences, gaining better understanding of global trends in water management and meeting experts to find out new techniques and approaches were common expectations." (p.36) *Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006*

**World Summit on the Information Society (WSIS) – Phase II (Tunis, Tunisia, 2005):** What participants said they liked about WSIS II clustered around networking and "the energy." *Evaluation Report, World Summit on the Information Society (WSIS) – Phase II (2005, Tunis)*

Here we set out the broad categories of participants in large conferences and the implications of their participation in relation to the conference objectives.<sup>16</sup>

### 2.2.1 Participants Who Share the Approach and Objectives of the Conference

These participants are usually experienced researchers who share a like-minded approach with the conference organizers and often work in close relation with them. They understand the approach and philosophy of the organizers and often present results in support of the organizer's idea, approach, innovation, or framing of an issue.

However, they could also present some concerns, especially when the aim is to promote or popularize a new approach. New ideas require some sort of intellectual contestation and testing for validation. Having mostly like-minded participants might reduce the potential for interrogating and reflecting on the ideas promoted by the conference. This is not only because they lend support to the organizing institution, but also because their confirmed position may intimidate or prevent others from questioning the promoted concept. The expectations of the participant in Evidence Window 11 suggest why participants who share the approach and objectives of the conference might be problematic. For a relative novice to the sector or community who might be looking to analyse unfamiliar approaches constructively, some designated space for reflection and interrogation is important.

<sup>16</sup> Within these categories, there are the Northern, the Southern, the young, the old, the professors, the students, the men, the women, the well-off, and the poor, the effect of which will be discussed in the following section.

#### **Evidence Window 11: The Difficulty With Congruent Participant Expectations**

**The Fourth World Water Forum (Mexico City, Mexico, March 2006):** –Those who had not attended a large international conference before, such as the WWF4, were also interested in gaining knowledge and new experiences from other countries. As one of the partners expressed, *“I have always wished to be in an international gathering in which I will be exposed to different global issues and new technologies and techniques that would help me in doing a better job ... It is my first time in an international forum, so I will be able to learn a lot about other countries’ water problems and how they are thinking of solutions.”* (p.36) Report from IDRC’s Participation – The Fourth World Water Forum, Mexico City, March 2006

### **2.2.2 Participants Who Aspire to Affiliate Themselves With the Conference’s Promoted Approach**

There may be two types: those who think they are on the same wavelength and follow the approach and objectives promoted by the conference, and others who try to *appear* to be following the same approach as that promoted by the conference. Both types in this group mostly consider these large conferences to be opportunities to gain legitimacy by associating themselves with the conference and the conference organizers.

Most conference organizers are aware that researchers will not automatically change their practices just by being at the conference and listening to the policy initiative of the conference organizing agenda. Nevertheless, their presence, at least, represents an expansion of the communities that advocate the approach.

#### **Evidence Window 12: Delegate Attendance as Advocacy**

**EcoHealth Forum (Merida, Mexico, December 2008):** –*I am glad I was on the Mexican TV today. I confess I am not really sure what the approach is, but I cheated from the presentation I heard today and told them the same arguments!”* A participant. *Ethnographic Study of a Large Conference, Eco-Health Forum, Mexico 2008*

### **2.2.3 Participants Who Hold Objectives That Are Unrelated to or Conflict With the Conference’s Promoted Approach**

These participants may see the conference primarily as an opportunity to network, conduct meetings, prove to their institutions that they have influence (Eyben 2008),<sup>17</sup> or merely to take a break from work or visit a new country.

Many of these participants are very sceptical of the overall usefulness of conferences in terms of the organizers’ objectives; the attendance of participants such as these (who are mostly prominent in their field) still represents useful potential. From the organizers’ perspective, their mere participation in such large high-profile events has its own symbolic value. Even though not all participants approve of the knowledge produced or recognized by the conference, their presence can represent an implicit approval of the approach. IDRC organizers acknowledge that high-profile speakers have generated more attention for events, but they have not sought to assess the degree to which these speakers have increased the credibility of the conference agenda.

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<sup>17</sup> Eyben, R. (2008) *‘Conferences and the Winding Road to Accra: Performing International Aid’*, a paper to be presented to the seminar Knowledge practices of international development agencies, Helsinki, 22-23 May 2008.

## Some Practical Implications

- These differing motivations need to be taken into account in planning and delivering a conference, although it was striking that an analysis of participants' roles featured relatively little in the institutional review.
- IDRC needs to articulate an explicit approach to participation in conferences, where each category of participant might be seen as having a certain strategic value, offering opportunities to enhance legitimacy, credibility, policy framing, or access to drivers of change. For example, like-minded participants often present supportive results, but may reduce the potential for interrogating and reflecting on the ideas presented by the conference; –aspiring” participants represent an opportunity to expand the communities that advocate the approach; and –sceptical” participants' attendance may represent an implicit approval of the approach being brokered.

## 2.3 Conference Dynamics

The evaluation reports of previous conferences and interviews suggest that most moments of appreciation and high energy in conferences are associated with the quality of the discussions and interactions; contentious issues of complaint were usually associated with the agenda, the delays, the facilitation, and a lack of room for discussion. This speaks to the importance of participant dynamics—and how these are managed—in the conference experience. A number of perspectives on the dynamics of conferences emerged from the study.

### Key Finding: Conference Dynamics

The underlying dynamics—the quality of the discussions and the interactions and how these are facilitated or hampered by the agenda or planned activities—affect the perceived success of the conference.

A number of dynamics—such as social and academic hierarchies, language hegemony, and socio-economic status—are not created by the conference itself, but are still present yet are rarely addressed.

### Evidence Window 13: The Conference—More Than the Sum of Its Parts

***The Fourth World Water Forum (Mexico City, Mexico, March 2006)***: “It was the dynamics and the quality of participants, not the program itself, that was remarkable and that made this event worthwhile from a networking point of view. An important aspect of our planning was having this mindset. In fact—seeing the WWF4 as the convener and provider of an event drawing in big names and diverse actors—within that context we were able to ensure that our time was well planned and spent.”(p.14) *Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006*

### 2.3.1 Seeing Conferences as Embedded in the Rest of the World

Conferences should be seen as embedded in a broader social context. Despite the professional interests or expertise that might distinguish delegates from the general public, large conferences will still reproduce all the structural differences, hierarchies, and challenges that might be found in social and political spheres outside the event. Reflecting on some of the criticism made about the experience of large conferences supports this view. For instance, the sensitivities around how the choice of working language might lead to exclusion for some—which featured in several interviews and a number of conference documents—is a manifestation of language

hegemony in the academic field (Kitchen 2005<sup>18</sup>; Davis et al. 2008<sup>19</sup>). There are a number of dynamics that are not created by conferences, but which are represented in these spaces.

<p><b>Evidence Window 14: The Need for Orientation Support</b></p> <p><b>The Fourth World Water Forum (Mexico City, Mexico, March 2006):</b> Although most were excited about the opportunity of attending the event, some expressed their concerns: <i>I expect to have trouble getting to the Banamex Centre! (i.e., the venue) 'The size is intimidating.'</i> (p.36) <i>Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006</i></p> <p><b>XVI International AIDS Conference (Toronto, Canada, 2006):</b> <i>—The conference was too Hollywood-ised and must have been a strange experience for many Africans,</i> noted an EcoHealth partner, regarding the International Aids Conference (IAC 2006). <i>Report on IDRC's participation at the XVI International AIDS Conference, Toronto, Canada, 2006</i></p>
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It would be unfair to expect the organizers to eliminate these structural differences completely in the relatively short duration of the conference. This reinforces how important social positioning is for any delegate's experience of a large conference. However, we suggest that there are a number of steps to reduce the effects of these structural differences.

**Some Practical Implications**

- Recognising these differences in structure and power relations is the first step to addressing the issue. Organizers should pay attention to factors that may affect these dynamics and think of ways to address them on all levels. IDRC is already demonstrating some awareness of this, but the process needs to be better planned and systematized. For example, the EcoHealth Forum contracted facilitators to provide some technical support to manage the on-site engagement of participants. However, the use of facilitators who are well trained in participatory approaches should be given full managerial commitment and should include allowing them to influence the development of the conference agenda and processes. At the moment, the facilitators' role is that of a service provider, which leaves them little room to influence the conceptualisation and various elements of the planning.

**Key Finding: Managing Dynamics**  
 Addressing the conference dynamics and recognizing the conference as an emergent process is not always evident in IDRC planning processes and plans. However, when IDRC anticipates and encourages innovations that address these issues, it is a determining factor in the conference's success. Therefore, planning opportunities to respond to strategic objectives is more valuable than the detailed planning of each available conference minute.

- It is also worth noting that some participants will require special support to negotiate the event, just as the high-profile dignitary requires special protocol. For instance, indigenous groups staying in a luxury hotel may need particular orientation. There are similar issues related to language. Strong indications came from the institutional review for increased sensitivity around the logistical difficulties that some research partners face in participating

<sup>18</sup> Kitchen, R. (2005) *Commentary: Disrupting and Destabilizing Anglo-American and English-language Hegemony in Geography*, *Social and Cultural Geography* 6: 1, 1-15.

<sup>19</sup> Davies, A., Merilainen S., Tienari J. and Thomas R., (2008) *Hegemonic Academic Practices: Experiences of Publishing from the Periphery*, *Organization* 15.4: 584-597.

in these types of conferences and for the setting of a standard for planning and managing the IDRC Welcome space.

### **2.3.2 Recognising Conferences as Emergent Spaces**

Seeing the conference as an emergent process that is dependent on the interactions of all the different actors with each other and in response to the structure is important to the organizers' way of thinking about conferences. Many organizers spend a lot of time planning every detail of the conference (see Evidence Window 8), but what happens in reality does not typically follow the plan. The actions of participants configure and shape the process as much as they are shaped by it (Mowels et al. 2008).<sup>20</sup> In this respect, detailed specific plans for every space and every time slot might not be the best way for organizers to invest their efforts. As argued in previous studies for IDRC (Taylor and Ortiz 2008), understanding complexity means that the process does not necessarily follow the plan.

It is important to understand that there is a difference between thoughtfully designing a process that addresses issues of power relations and structural differences, and creating a packed and very detailed fixed scenario of what will occur during the conference. This point is also connected to the next key point, about recognizing and fostering participants' agency.

#### **Some Practical Implications**

- At least as much attention needs to be given to the type of planning, as to the amount of planning. Planning is crucial, but it should not be the detailed planning of each minute on the agenda and each session, but rather the planning of opportunities to respond to various strategic objectives. This requires acknowledging that the knowledge-sharing agenda is only a part of the large conference opportunity and that participants need space to exercise agency. For instance, what message is being conveyed to policy makers and how could participants participate in conveying these messages? How could conference organizers communicate the purpose to various stakeholders and identify with whom they need to build bridges? These are crucial questions.
- Practical mechanisms are needed which allow IDRC to provide more open facilitation in conference processes, including quite simple inputs such as providing work stations and meeting rooms for participants' convenience, impromptu meetings, etc.

### **2.3.3 Recognising and Fostering Participants' Agency**

There were several examples in the conferences reviewed where participants suggested following a different presentation format: some decided to give the presentation in their own language rather than the session language and others even decided to change the language of the entire session. Anticipating and encouraging this innovation can be difficult and resource-intensive, but as Evidence Window 15 points out, it can be the determining factor in a successful conference.

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<sup>20</sup> Mowels C., Stacey, R.D. and Griffin, D. (2008) 'What Contribution Can Insights from the Complexity Sciences Make to the Theory and Practice of Development Management', *Journal of International Development* 20:804-820.

#### **Evidence Window 15: Supporting Innovation**

##### ***International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):***

–The Forum gave tremendous opportunities for people to present their views. Special attention is deserved by the poster-driven sessions, unanimously acclaimed by all participants and interviewees as the best tool ever used. Some participants conceived these sessions as a ‘new and more proactive concept’ and ‘an effective platform discussion’. The participatory nature of this tool raised a lot of interest among participants and stimulated a lot of discussion. According to one Forum organizer *“the involvement was so impressive that half an hour after chairing the session people were still discussing and exchanging ideas.”* (p.10) *Evaluation Report – International Forum on Ecosystem Approaches to Human Health, Montreal, May 2003*

##### ***International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):***

A few interviewees noted the innovative nature of the agenda as one of the most successful aspects of the EcoHealth Forum. As noted by an IDRC interviewee: *“One of our main concerns for the conference was that we wanted it to represent the views of the South. The program was designed with a format that was perceived to give Southern researchers as much exposure as possible. For this reason, the program took a three-pronged approach—classic presentations, plenaries, and poster-driven seminars. Each day of the six-day Forum had a different thematic. The morning session was a plenary that demonstrated the work from both Northern and Southern researchers. The afternoon sessions were a combination of classic presentations and poster-driven seminars. The poster-driven seminar was an idea that came out of the Program Advisory Committee, where numerous researchers presented a pre-made poster of their work for ten minutes, after which, the poster was debated and then discussed. Strategic Evaluation of IDRC’s Participation in Large Conferences—Phase One Background Paper—How and Why IDRC Participates, by Laura Haylock, IDRC, Evaluation Unit, July 2008*

The ethnographic study revealed why it is important to encourage organizers and participants to be reflexive and responsive. There were times in the study (EcoHealth 2008) when participants were too compliant with the plan and the structure. In several formal and informal discussions, the evaluation team observed participants self-censoring their arguments—for instance, stopping themselves from going on to talk about the politics of conducting research in their communities in order to stay ‘on track’ and discuss core environmental health issues. While this focus can be a good thing because it can allow for a more productive delivery against a particular agenda, it is not very constructive if there is no space to reflect on other agendas that have been stymied in the process.

Reflections in the ethnographic study also demonstrate how guidelines for participants could undermine their sense of power and legitimacy. For example, in many sessions, even though there were fewer than 10 participants in a big room formally set-up for 50, no one altered the seating arrangements. This suggests that, in some of the participating communities, there is an implicit understanding about their freedom (or lack thereof) to manage their environment or express themselves at large conferences.

#### ***Some Practical Implications***

- Participant agency can be facilitated by investing some thought in sending the right messages and providing spaces conducive to creativity. The way the event is facilitated, the physical setting, and the messages conveyed about the conference vision could all contribute to a process that would *“really make a difference.”*
- Conference organizers need to develop clear responses to emergent opportunities—such as allowing space for participants to evolve their own agenda around the impact of workshops and meetings. In the institutional review, participants’ calls for meetings were

often seen as “piggy-backing” before or after the main event. But it is these impromptu or “marginal” meetings that can have a significant impact on the perceived outcomes and success of the main event (see Evidence Window 16).

<b>Evidence Window 16: Making the Most of Conferences With Before and After Activities</b>
<p><b>Third Edition of the UN-Habitat World Urban Forum (Vancouver, Canada, June 2006):</b> –The communication consultant, who offered training to Spanish-speaking partners in Montreal and facilitated rehearsals in Vancouver, noted in his final report that <i>–when compared to Montreal presentations (i.e. earlier ones), the final presentations in Vancouver were much clearer, more stimulating and more attractive. Also the messages were better developed and distilled....</i>” Feedback monitoring underlined the importance of approaching capacity-building activities with sensitivity and care, in order to avoid conveying the wrong impression to IDRC partners. [However] one partner suggested that the extensive attention devoted to preparation, training and rehearsals reflected <i>insecurity floating in IDRC,</i> while others emphasized the importance of ensuring that the training did <i>not</i> turn into a school exercise.” (p.23) <i>IDRC-Partners @WUF2006 – Report on IDRC’s Participation in the Third Edition of the UN-Habitat World Urban Forum, Vancouver, Canada; June 2006</i></p>
<p><b>XVI International AIDS Conference (Toronto, Canada, 2006):</b> –Piggy-backing on large conferences with a pre-meeting workshop would in turn allow for more in-depth discussion between partners but also between IDRC and individual project colleagues. It is highly recommended as a mode of convening like-minded partners prior to a large conference to allow for strategic planning and interaction. One thing to keep in mind though is partner fatigue.” (p.21) <i>Report on IDRC’s participation at the XVI International AIDS Conference, Toronto, Canada, 2006 and Evaluation Report</i></p>
<p><b>International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):</b> –We need to plan ahead a post-forum exercise such as an immediate follow-up perhaps through a final exercise, where participants have the opportunity to express their immediate post-forum goals.” (p.23) <i>Evaluation Report – International Forum on Ecosystem Approaches to Human Health, Montreal, May 2003</i></p>
<p><b>The Fourth World Water Forum (Mexico City, Mexico, March 2006):</b> –<del>W</del> ended up using paper evaluations but it seems it might have been useful to do something more engaging.” (p.13) <i>Report from IDRC’s Participation – The Fourth World Water Forum, Mexico City, March 2006</i></p>

### **Some Practical Implications**

- A condition of support for IDRC-sponsored delegates should be attendance at a full-day meeting, preferably before the conference, with a whole day of presentations of IDRC-supported work. This would allow for more in-depth discussions between partners, but also between IDRC and individual project colleagues.
- A post-event meeting or assessment mechanism would capture the feelings of delegates, as well as knowledge or strategic insights that could be used to inform subsequent activities.

Most of those involved in organizing these events are well aware that the function of large conferences is different from that of smaller scale conferences, workshops, and high-level meetings. However, such awareness is not always translated into the way the Centre approaches large conferences. For instance, IDRC’s large conference planning tends not to provide space for the multiple agendas of organizers and participants, or for the dynamic generated by large numbers of participants.

There was rarely an interview, a discussion, or an informal chat with participants or organizers that did not include the common statement, “But this is what happens in every large conference!” There is an acute awareness of many of the inadequacies facing large conferences, but all respondents still see these events as necessary and fundamentally worthwhile. What is perhaps more significant about that statement from the perspective of this report, is that it reflects the notion that there is a commonly held understanding about how large conferences work and the prospects and limits of what they can achieve.

### 3 Strategic Implications for IDRC

In Section 2 on Key Findings, we presented a number of practical implications for increasing the efficiency of conferences based on our findings from the literature, delegates, and respondents. We understand that these practical suggestions are idealized and they could play out very differently in a complex reality, but they do provide a useful starting point for reflection on how large conferences work. In this section, the report presents the *strategic* implications and specific recommendations for IDRC and its various administrative functions. Where appropriate, the report refers to recommendations emerging from the review of institutional memory.

An overview of the apparent state of practice around large conference engagement) provides a useful starting point for what IDRC’s needs are at this point. (See Table 1.)

<b>Table 1: Key Finding: IDRC’s Strengths and Weaknesses in Engaging in Large Conferences</b>	
<b>Strengths</b>	<b>Weaknesses</b>
A wealth of institutional knowledge about what works and the learnt capacity to innovate within the system.	A lack of articulated strategic direction, which would facilitate innovation, guide institutional collaboration, and rationalize efforts.
An awareness that large conferences generate significant moments for showcasing or mainstreaming innovative ideas and practices.	IDRC staff and managers do not use planning tools (such as the critical path) strategically, linking activities and events to the Centre’s mission.
Flexible practices for engaging with conferences in funding, planning, facilitation and reviewing. This supports opportunities for innovation, which is taken up by some organizers sometimes.	There are few standards across the Centre that would support or encourage innovation in areas critical to maximising the perceived success of conferences.
Awareness across the Centre and its partners of the potential for more systemic learning. This demand for reflexive practice is the first step in building capabilities to manage large conferences more effectively.	Evaluation frameworks still assess conferences as stand-alone events and do not track outcomes over time or in relation to a larger strategy. This is important if IDRC is to make a bolder assertion of the value of large conferences for its global mission.
A strong sense that conferences are not stand-alone events. This comes from a sophisticated understanding of influencing as non-linear and relationship driven.	There are no guidelines to monitor the costs of large conferences.
An awareness amongst a significant number of staff of the diversity of objectives which can come to bear on a single conference.	Staff are not sure how to support their insights about the complexity of conference dynamics and tend to revert to inadequate practice, such as over structuring and reducing the diversity of spaces.

#### 3.1 Strategic Framing of Outcomes

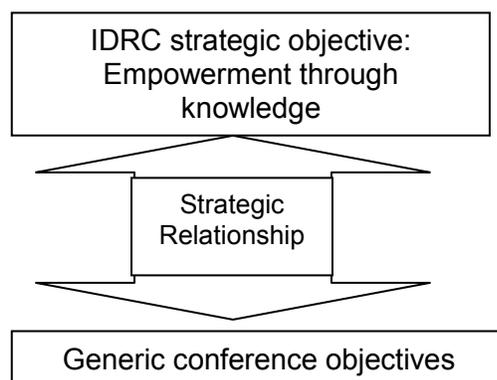
There appear to be a diverse number of pathways for how large conferences can contribute to the IDRC agenda. At the moment, there is a nominal narrative that suggests all conferences offer enough generic value to the Centre’s mission to be worth supporting. However, it is clear from concerns about levels of stress and the balance of resource investment that more needs to

be done to frame the Centre’s expectations of conferences and to allow for more purposeful and strategic “editing” of the work plan around conferences.

Political scientist, Ben Ramalingam<sup>21</sup> describes a longitudinal study in the *Harvard Business Review*, which suggested that the way senior executives interpret their environment is more important to performance than the accuracy of their knowledge about the environment. There are some useful parallels here. Given the complexity of large conferences, crucial questions need to be asked about what to measure for success and how to do this. There are equally important questions that inform the choice of investment of resources to deliver expected results—or a set of outcomes. This implies that having a consistent and clear mindset about the value of a large conference to IDRC is crucial in delivering results for the Centre. Understanding *exactly* how a large conference works only matters once you are clear about your rationale for engaging in one. Also, the dynamics of a large conference mean that outcomes and processes may be very unpredictable. It would appear from the evidence that there is an intuitive awareness amongst a significant number of Centre staff of what constitutes good practice around large conferences, but there is no indication that staff have a framework to innovate or support this intuition. (See Evidence Window 1 for instance, or note the observation that most conference organizers felt frustrated when conference participants organized “fringe” events outside the conference agenda.)

We believe that a framework is needed which can accommodate generic conference objectives, but which expresses the core business of IDRC in a way that allows staff to see a relationship across these objectives and with the Centre’s mission statement. The value of having a framework that gives a clear relationship across the objectives and with the institutional mission is that it provides:

- a way to calculate acceptable trade-offs in expectations of different groups from the perspective of the Centre;
- a pathway for the engagement of various functions/departments across the Centre;
- a pathway for developing a work plan of activities around the conference (particularly after); and
- a clearer definition of the *category* of outcomes (i.e., policy influence; showcasing and mainstreaming; and networking and partnerships) the Centre is expecting from its engagement.



<sup>21</sup> [www.odi.org.uk/RAPID/events/Complexity/Complexitypresentation.html](http://www.odi.org.uk/RAPID/events/Complexity/Complexitypresentation.html)

### 3.2 IDRC as a Policy Entrepreneur

Kingdon's notion of the policy entrepreneur provides a useful way to describe how IDRC might engage with large conferences. These are agents who occupy "in-between" spaces concerned with introducing, translating, and helping to implement new ideas into public practice (Corbett 2003). The role of policy entrepreneur draws on the Centre's aspiration to be a facilitator of social change through its role in international research. IDRC's role as a bridging organization is not unique, but a closer look at the theoretical underpinnings of policy entrepreneurship provide a set framework to help IDRC make decisions about how to engage (the critical path) and how to apply some of the practical implications referred to above.

#### **Key Finding: Large Conference Contribution to IDRC Agenda**

While all conferences offer enough generic value to the Centre's mission to be worth supporting, IDRC lacks a strategic framework to guide its investments in the significant resources and energy needed for large conferences. There is some evidence to indicate that a more explicit commitment to policy entrepreneurship would support a more purposeful and strategic involvement in large conferences.

This conceptualisation of policy entrepreneurship supports IDRC's mandate to invest in partnerships in the interest of building the knowledge base that informs development policy and practice. Large conferences provide an opportunity to broker demand (for innovations with research-generated knowledge) and supply (by research partners and information intermediaries). As a result, the policy entrepreneur role requires substantial networking capacity and the credibility to access the appropriate decision makers (policy venues). The policy entrepreneur's position is to enhance the quality of research uptake rather than to take a specific advocacy position on particular issues. There is some evidence to indicate that a more explicit commitment to policy entrepreneurship would support partners' various interests.

#### **Evidence Window 17: Added Value for Partners**

***The Fourth World Water Forum (Mexico City, Mexico, March 2006):*** Key conclusions are that our partners responded quite positively to the opportunities that the forum provided which ranged from the opportunity to engage and communicate with political figures (i.e. water Ministers from Bolivia, Egypt, Jordan); to the chance to be showcasing their work on such a large scale to like-minded researchers and interested audiences; to simply having the opportunity to gain profile and credibility in their respective countries through attendance at this high profile global event." (p.10) *Report from IDRC's Participation – The Fourth World Water Forum, Mexico City, March 2006*

The four aspects of policy entrepreneurship listed in the box "Four Identifiable Aspects of Entrepreneurship" below begin to point to the functional implications for IDRC.

### **Four Identifiable Aspects of Entrepreneurship**

These help explain *how* policy entrepreneurs achieve their goals:

1. The first is the ability to clearly sense what others are looking for so that they can perceive opportunities for gain.
2. Second, they must develop innovations.
3. Third, they must devise strategies and work the system ... this is important because it provides entrepreneurs with information that can be critical to their success.
4. Fourth, entrepreneurs must organize others and provide leadership. This [corollary] reflects accumulated knowledge that the policy entrepreneur cannot achieve their goals without cooperation from others. For entrepreneurs, either inside or outside of government, policy change must be accomplished in conjunction with others policy actors. . . . Leadership is a critical facet of entrepreneurship.

Tera Lea McCown

Innovations, in the Centre's context, would mean supporting the development of new ideas and technologies through research-generated knowledge. Strategy development as suggested in the third aspect of entrepreneurship might involve the Centre framing the research innovation to appeal to key decision makers; mobilising the appropriate coalitions to support this brokerage and providing capacity support for other brokers to identify potential innovations and decision makers in various contexts. It is important to note that this notion of the policy entrepreneur is not intended to generate new activities across the Centre, only to provide a new way of looking at the Centre's role in engaging in large conferences.

The notion of IDRC operating in a policy marketplace and demonstrating innovation through research opens up a number of strategic questions for how the Centre might achieve change. Since Kingdon introduced the entrepreneur concept, a number of developments have helped to further articulate how entrepreneurs achieve policy change. There are three key components in the process:

- agenda-setting (which includes the problem framing);
- legitimation; and
- policy implementation.

These components are nominally conceived to be linear, but McCown (2005) and others describe a very iterative process. The basis of this iteration and reflection is what Kingdon called "policy windows" but may be regarded more usefully as policy venues and policy imaging. The policy venue is the space (normally institutions, but it could as be networks or movements) which have the authority to make decisions that could effect change. The policy image is the way that the issue is framed—how it defines the problem and the solution, and the discourse around it. It is felt that the successful entrepreneur is constantly adjusting the venue and images according to environmental factors—re-defining and re-positioning the issue and the policy options according to various knowledge inputs.

### **3.2.1 Enhancing Value for Money**

As has been noted, we do not have the data available to make judgements about the cost benefits of large conferences. The report can reflect on existing practice, however, and suggest how value for money could be improved by adjustments in the Centre's approach to large conferences. There is also an intellectual rationale for focusing on the process in any cost benefit analysis for large conferences because one of the central concepts of complexity science is that we need to be more modest about what we believe can be achieved as a direct

consequence of our interventions. While there is no certainty about the outcomes of any intervention, given the interdependence of tangible and intangible factors that drive shifts in our societies, including within policy spheres, we can at least aim for increased efficiency.

There are a number of factors that IDRC can address, from a policy entrepreneur perspective, to allow it to maximize the efficiency and effectiveness of its investments in large conferences, if there is an understanding that these events have emergent properties that cannot be fully foreseen.

### **Consider the Opportunity Costs**

IDRC should consider investing in conferences when they provide opportunities that would be difficult to achieve otherwise. Clearly, there is considerable value in face-to-face communication:

–The single most important reason for me to attend real-life conferences is to do something that cannot be replaced by the best communication technology available: human interaction, meeting people face-to-face and getting to know strangers across different verticals that you would not have bumped into otherwise. Nobody will or even can do business with everybody who you meet and get to know at those conferences, but that is also not the idea behind this.” (Cumbrowski 2008)

There is an argument to be made about how the policy, learning, and networking objectives configure to provide pivotal moments of learning in the sector. Aiken actually attempted to ascribe an opportunity cost to this learning (see box *Lessons Learned From Keystone Symposia*”).

#### **Lessons Learned From Keystone Symposia**

–To connect the scientific community for the benefit of society, for example, or to catalyze scientific progress and accelerate achieving research goals” (Aiken b). The questions posed to delegates for this review of Keystone Symposia focused on whether conferences had potential to or had encouraged research collaboration and sharing of information, impact on research (new ideas, directions, advancement of science, time, and money saved) and impact of careers. Follow-up surveys were then conducted at nine and 18 months after the conference to assess progress against these initial questions posed. Aiken includes a question about time and money saved and makes a calculation that suggests that Keystone Symposia’s conferences causes \$20–\$30 million in research funds to be diverted to more effective use per year.

However, perhaps the most crucial point from the policy entrepreneur’s perspective is that the opportunity cost of a conference is principally about the timing. To determine the appropriateness of the timing, a number of questions need to be considered, including:

- Is this the best time to build or extend legitimacy? Is the coalition ready to support your credibility?
- Is the policy venue ready and available?
- Is the framing of the problem and the policy ready? Is this a good moment to shape that framing?
- Is there a cadre of policy entrepreneurs ready to participate? (Viewing the planning and facilitating of large partnerships as a capacity-building opportunity will increase the value for money of the event. And, as we have seen, it is important for IDRC to support a network of policy entrepreneurs in national spaces.)

These questions also serve to provide a "reality check" of the value of the large conference as an activity amongst the other activities implied in the work of brokering political and policy change as an entrepreneur. There is no evidence, even where program managers are using "critical path" planning documents, that they are asking these kinds of strategic questions systematically. Although there is an awareness that large conferences can themselves generate "significant moments" for showcasing or mainstreaming by virtue of the energy generated, this is not the same as identifying and maximising synergy for the event.

### ***Use the Conference for Adaptive Learning***

Kingdon and subsequent theorists of entrepreneurship have emphasized the importance of the formulation and implementation phases of policy development for delivering effective policy outcomes (Tepper 2004; McCown 2005). This requires the entrepreneur to conduct ongoing analysis of the environments within which they are operating. It may be necessary to shift attention to other decision makers (policy venue) or to change the framing of the issue (policy image) depending on where a policy initiative may be most salient or according to broader shifts in the development policy environment.

Large conferences provide an opportunity to maximize efficacy as an entrepreneur by building mechanisms to read the environmental conditions and dynamics. This has implications for developing frameworks to be used by the evaluation teams for conferences and resonates broadly with findings that emerged from the institutional review. Many staff expressed an appetite for an evaluation mechanism that would substantively inform learning and future approaches across programs and teams. There was also an awareness among some staff that the evaluation could help in deciding how to manage follow-up activities.

### ***Use the Conference for Capacity Building***

IDRC can use conference convening with partners as a chance to invest in capacity for a particular class of policy entrepreneurs—individuals and institutions who can facilitate and manoeuvre for political and policy change. Building a legacy in this way will enhance the impact of IDRC's engagement in conferences. This also requires a framework to assess partners' capacity and suitability for these partnerships (see Reisman et al.).

### ***Invest in Persistence***

For Kingdon, policy entrepreneurs are those who manage to advance issues on the agenda and are skilled, authoritative, ambitious, and unusually tenacious (Corbett 2003).<sup>22</sup> Specifically, he notes that "persistence implies a willingness to invest large and sometimes remarkable quantities of one's resources" (Kingdon 1995).

This has a number of implications when assessing the cost benefits of large conferences. It suggests that the Centre should build a realistic picture of the investment required to affect social change and celebrate examples of good practice and successful case studies to boost staff morale. It is also important that the Centre be disciplined in the conferences that it chooses to invest resources in, focusing on long-term priorities.

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<sup>22</sup> "Ideas, Institutions and Policy Entrepreneurs: Towards a New History of Higher Education in the European Community," Anne Corbett, *European Journal of Education*, Vol. 38, o. 3 (2003).

### ***Economize on Carbon Costs***

One recommendation from the institutional memory review was that IDRC should make every attempt to be as environmentally conscious as possible at conferences. There was no evidence the evaluation team came across about systemic plans to reduce the carbon costs of the conferences or to draw on a set of principles for sustainable events. This means calculating the carbon footprint for all activities at the conference, not only for flights. It would be useful to make a baseline carbon footprint calculation for a conference where delegates and organizers log their use of taxis, buses, and travel within the conference itself, as well as their use of air travel. It would also mean documenting any activities that might contribute to increasing the carbon footprint of the event, such as paper usage and general energy consumption. The Centre can then monitor its carbon footprint per capita with occasional carbon audits..

The use of carbon credits is to be encouraged, but it will be important to ensure that purchased offsets have a verified sustainable development benefit—most commonly achieved by purchasing “Gold Standard Clean Development Mechanism” (CDM) credits rather than purchasing through the much less regulated voluntary carbon market. If not purchased through the CDM, then the Centre should invest in carbon offsets that specifically target socially responsible and beneficial projects (e.g. Carbon Aided).

## 4 IDRC-Specific Recommendations

### Evidence Window 18: The Issue of Hard Work and Pressure

#### ***International Forum on Ecosystem Approaches to Human Health (Montreal, Canada, May 2003):***

The key challenge that affected all stages of the Forum was workload issues. Numerous interviewees mentioned that approximately six months prior to the forum the workload increased substantially. In the words of one IDRC interviewee *“Around the six month mark you can’t imagine how much work it will be ... at the end we just put the other work aside and focused on the conference.”* Most IDRC staff interviewed agreed that while they had known the forum was approaching, they had not integrated the pre-conference planning work effectively enough into their work planning ... The quantity of work and the related stress also affected IDRC staff’s ability to participate in the forum. One IDRC interviewee noted that s/he would have liked to participate in the sessions and connect more with research partners at the forum, but was unable to because of the numerous tasks s/he was responsible for ... Some interviewees felt that the follow-up activities (i.e. publications) took a bit longer than anticipated because (a) they were not planned for appropriately before the forum, and (b) the team was exhausted—*“after the conference we were completely exhausted and it was very difficult to keep the momentum of the event ... it would have been better if we had planned the work load better.”* *Strategic Evaluation of IDRC’s Participation in Large Conferences—Phase One Background Paper—How and Why IDRC Participates*, by Laura Haylock, IDRC, Evaluation Unit, July 2008

The evaluation team recognizes the specific pressures which IDRC staff and partners are placed under with managing conferences. This section of the report presents suggestions for how the findings and policy entrepreneurship framework might apply to the key administrative functions as they relate to IDRC’s engagement with large conferences. Most of these revolve around the need for more conscious planning across the Centre in the early stages of engagement with a large conference. While the typical approach is for one program to lead an initiative and call on various operational areas as the scale of the conference evolves, this misses the opportunity to maximize efficiencies in planning, implementation, and learning. Improved mechanisms for centralized planning and delivery will also make it easier for the Centre to monitor real costs and associated outcomes of large conferences.

### 4.1 For Senior Management

- i.) **Clarify the strategic relationship between IDRC’s mission and the purpose of conferences.** This will also require a framework that clarifies the conditions under which the Centre will co-convene large conferences.
- ii.) **Establish a process to support decision making across the Centre (starting with determining whether to make the investment).** This might be reflected in a ‘critical path’ document to stop the habit of the Centre finding itself involved in large conference planning without conscious forethought.
- iii.) **Get a realistic sense of the time and resources involved in convening large conferences from all sections of the Centre (including the environmental costs through a carbon audit).** Allow for measures to deal the resource outlay, recognising that the support provided by General Administration Department (GAD) cannot be outsourced and that large conferences require a wide diversity of skill sets, not only those provided by program officers.

- iv.) **Build space for learning and adapting, especially in the planning phase, to maximize the efficiency that can come from shared learning.**
- v.) **Support the idea of engaging diverse policy venues and adaptive framing of research knowledge to stimulate demand and support uptake.** This will mean using IDRC's political status as a bilateral partner and the Centre's capacity building agenda with partners to support this approach to policy-research brokering.
- vi.) **Observe the measures identified elsewhere in the report to increase the value-for-money benefits of large conferences.**

## 4.2 For Programs

- i.) **Coordinate across the Centre early and thoroughly.** It would be helpful to have a central planning mechanism that included the GAD, the Evaluation Unit, and the Communications Division so they can offer technical support, skills, and institutional knowledge about resource requirements, opportunity costs, and effective strategies for large conference convening.
- ii.) **See a large conference as an enabling environment, not a big workshop.** Avoid the instinct to be a grand designer: focus on facilitating and creating an enabling environment for productive engagement by diverse participants. It might be helpful to conceive of the conference as a site for a variety of communicative processes engaging diversity communities. These communicative processes provide a number of strategic opportunities for the policy entrepreneur.
- iii.) **View large conferences as part of an ongoing strategy.** Studies of policy development processes often point to the time, negotiations, and relationship building required for change in policy and practice. This underscores the value of conceiving the conference as a point in an ongoing process. For example, the workshops conducted with researchers in Nepal and Argentina, prior to the decentralization conference in Mexico, have proven to be very important for the policy formulation process during the conference. The institutional review repeatedly made reference to the need for some framework for planning and managing follow-up activities. This could be supported by building conferences into program prospectuses and building long-term policy objectives into the critical path for conference engagement.<sup>23</sup>
- iv.) **Clarify and communicate strategic priorities.** Support a process that institutionalizes and standardizes decision making across the Centre, starting with determining whether to make an investment. This should allow logistical decisions to be informed by strategic decisions.
- v.) **Support the idea of engaging diverse policy venues.** Engage IDRC's political status to leverage this and note the measures to increase cost benefit analysis. Large conferences require a wide diversity of skill sets and not just those of program officers.

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<sup>23</sup> The institutional review made recommendations for building a framework for cross-institutional engagement at conferences and called for the inclusions of conferences in program prospectuses.

- vi.) **Build the capacity of other policy entrepreneurs where possible.** Identify convening partners who are or could become policy entrepreneurs in their own contexts. This combines the Centre’s capacity building agenda with a policy change strategy while responding to the practical needs of large-scale conference organizing. For instance, this could provide a framework for the selection of local organizers.
- vii.) **Take advantage of IDRC’s location internationally.** In considering coordination with Canadian actors, it is useful to engage those who can support the Centre’s legitimacy and authority or who might be focal points as ‘policy venues.’ This means that the Centre should mobilize alliances with key figures and institutions in the public and private sector that might help provide access to high-level decision makers on behalf of partners, with research that responds to specific needs.
- viii.) **Take advantage of local knowledge.** An effective local consultant (such as the one used in Bamako) helps facilitate the process, reducing the pressure on IDRC staff in terms of the multiple roles they might have to play as policy entrepreneur, organizer, administrators, and even sometimes translators. A local consultant is also more aware of local politics and would eliminate certain tensions through effective communication. However, the selection of the local consultant is crucial, as an incompetent local consultant/organization could end up being more of a burden than a support to IDRC staff. Keep in mind: It is important to allow sufficient preparation time for the conference (6–9 months is not enough for an event of 700 participants), and a local partner/organizer/consultant can provide opportunities for capacity development and expanding IDRC's network globally. In this respect, a local partner might not be as efficient as IDRC staff, but investing in developing their capacity and exchanging knowledge is important for sustaining service.
- ix.) **See conferences as a unique opportunity for facilitating networks.** IDRC needs to invest a big effort in fostering networking activities during a conference. This effort needs to take the form of advocating networking rather than structuring networking.
- x.) **Focus the communication objectives on preparing information to “orient” participants.** The information should not only be about the logistics, but also about the thematic content of the event. This is important if there are to be diverse audiences and a variety of communicative processes taking place, as it manages participants’ expectations and sets up constructive dynamics. Set up the spaces for dialogue (recognising that different actors may require different spaces) and communicate the importance of this to delegates clearly and emphatically, so that researchers, for instance, understand the value of high-profile politicians and media, or the need for communicating an innovation to audiences with varying levels of expertise, even within the conference setting.

### 4.3 For Communications

- i.) **See large conferences as offering unique and varied marketing opportunities for IDRC’s niche in the policy marketplace.** Conceiving of large conferences in this way opens up opportunities for innovation from a communication perspective, particularly when we consider the research and follow up that goes into most marketing activities. However, this report indicates that there is space for more than

one approach to policy brokering within a single conference and different modalities of communication are required at conference.

- ii.) **View large conferences as part of a larger, more sustained communication strategy.** This requires pre-conference events and follow-up activities to be planned just as carefully as the conference itself.
- iii.) **Support colleagues in considering the advocacy opportunities of large conferences.** This means considering the questions relating to opportunity costs, particularly those concerning the appropriateness of the timing of the event. The development of a consistent framework for a ‘critical path’ document used by program staff might be helpful here.
- iv.) **Avoid large conferences by stealth.** Support the idea of a reflexive, consistent cross-institute planning framework, which is triggered early on in program and communication planning.
- v.) **Prepare the setting to capture the policy “image.”** This refers to the symbolic communication which gives the policy meaning for the identified decision makers who might be most affected by the innovation. Typically, this happens when a high-profile public figure makes an appearance. Symbolic communication can be tactical in building coalitions and relationships because of what it suggests about the values and capital of the policy entrepreneur.
- vi.) **Think of influence, learning, and marketing together.** Record the proceedings for dissemination of knowledge and promotion of the Centre’s role as an entrepreneur, as well as for learning and strategic adaptation in achieving policy objectives.
- vii.) **Evaluate carefully.** Given the diverse opportunities for showcasing, mainstreaming, and general profiling available at conferences, it is important that the communication team monitor very carefully which communication processes are most important at conferences (e.g. displays of materials, sponsors etc.).
- viii.) **Use the Canadian public sector to leverage influence.** This means linking the influencing objectives more concretely to the basic ambition to make Canadian policy makers aware of the IDRC’s existence.

#### 4.4 For Evaluations of Conferences

- i) **Mainstream evaluation skills in conference management.** It was suggested that, like IDRC projects, the conference team should elect one responsible officer for the evaluative work of a conference with the Evaluation Unit providing technical assistance.
- ii) **Use evaluation to support reframing conferences as spaces where knowledge can be created.** Conferences are not just for knowledge sharing. The IDRC approach to evaluation at conferences should seek to go beyond looking at conferences as spaces for knowledge sharing and reframe conferences as spaces for knowledge creation. Spiegel et al. (1999) uses a similar technique for evaluating a professional conference, referred to as “responsive evaluation.” Responsive evaluation is characterized by the use of ongoing, interactive communication between the evaluators and the participants, the attention the evaluators pay to the

conference participants and their perspectives, the qualitative nature of the information gathered, and the integration of the evaluation into the conference. This responsive evaluation methodology is well suited for environmental monitoring, which is crucial for adjustments in venues and framing frequently employed by policy entrepreneurs and allows for diverse participant objectives.

- iii) **Link conference evaluation to other strategies and outcomes.** The evaluation of conferences is not an isolated activity. If the Centre is to maximize the return on resources invested in organizing large conferences, then evaluations should be linked to learning mechanisms that inform strategies for policy brokering, approaches to future conferences, and capacity support for partners.

Reisman et al. also suggest a useful framework for policy and advocacy organizations to apply in the evaluation of strategic progress. It is primarily a qualitative approach, which is flexible enough to be adapted to the flux of conference dynamics—interviews might be conducted in groups or individually.<sup>24</sup> (See box “Evaluation of Strategic Progress” below).

#### **Evaluation of Strategic Progress**

Examples of core questions about the process and indicators of progress:

1. Who needs to change (e.g., policy makers, agency staff who enforce policy, public opinion leaders)?
2. How does change occur (e.g., in ordinance, in policy, in funding for policy, in enforcement of existing policy)?
3. What type, level, duration, and quality of activities contribute to these outcomes?
4. What is the current window of opportunity for change?
5. Which partners will collaborate to achieve these outcomes? In what way?
6. What is a realistic short-term outcome/indicator of progress?

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<sup>24</sup> There are, of course, a wide range of evaluation approaches and methodologies that are of interest; Social Network Analysis (see Annex 7) may provide an interesting way to explore further the value of conferences.

# Annex 1: Terms of Reference

## Purpose and Intended Users

The **purpose** of this evaluation is: 1) *to assess the nature of IDRC's past engagement in large conferences; 2) to assess the results of that participation; 3) to better understand how the level of effort (financial and human) of IDRC's participation in large conferences relates to the benefit in participating in these events; and 4) to draw out practical tools and quality lessons for IDRC's future engagement in conferences.* It is not, however, the intention of this evaluation to give a definitive judgment about whether IDRC should or should not participate in these types of events in the future, although the evaluation findings will be one piece of information that will feed these decisions by IDRC management and staff. Neither is this evaluation intended to judge the particularities of any one conference in depth; as a corporate strategic evaluation this study will focus on the Centre's results from and experience with conferences more broadly.

Because different parts of the Centre have different objectives and roles to play in participating in large conferences, the unit of analysis for this evaluation will be IDRC as a whole (i.e. the Communications Division, PPB) and project research partners. Moreover, it is anticipated that the evaluation's **intended users** will be: 1) *Communications Division* and 2) *PPB programs and management*. It is intended that the evaluation will be useful for reporting on the results of IDRC's participation in large conference and planning for future participation. Any lessons drawn should be specific to the part of the Centre whether they can be applied (e.g. programs, Communications Division, Evaluation Unit, etc.) in order to facilitate their uptake and use in the future. Wherever possible, the evaluation should be supplemented with suggestions of practical tools for planning, coordinating, and evaluating IDRC's involvement in large conferences in the future.

In addition, the knowledge produced through this evaluation will be shared with a wider audience within and outside IDRC (e.g. IDRC partners, the Evaluation Unit, and donors and organizations) through electronic and print dissemination of the evaluation report.

## Evaluation Questions

The overarching questions of the evaluation will assess the results (e.g. outcomes, outputs, and reach) and *the process* (e.g. lessons) of IDRC's participation in large conferences. The evaluation will not limit itself to a particular time-span and will assess the intended and actual results and process, pre-, during-, and post-conference. In order to target these aspects, the evaluation will pose a series of questions.

The overarching question is, how large conferences as a generic format contribute to social change as understood in the IDRC mission statement. This in turn leads to a number of questions on process and results of IDRC's participation in such conferences. These questions are broken down into four sections (results, process, description, and cost-benefit) that together will give IDRC a holistic understanding of the nature of its participation in large conferences.

### ***Descriptive Questions***

- a) What influenced the decision to participate in the conference?
- b) What were IDRC's intentions in participating in conferences?

- c) What was the nature of that participation?

### ***Results Questions***

What has been the effect of IDRC and partner participation in large conferences on:

- a) Raising profile?
- b) Showcasing and promoting the use of research findings?
- c) Providing networking and new partnership opportunities?
- d) Other effects?

### ***Process Questions***

- a) What are the lessons PPB and Communications can draw from the planning, implementation, and wrap-up phases of participation in large conferences?

### ***Value for Money Questions***

- a) To what extent does participation in large conferences produce results of sufficient value to justify their cost?

## **Roles and Responsibilities**

### ***Evaluation Advisory Group***

IDRC's participation in large conference includes the involvement of multiple parts of the Centre. For this reason, an evaluation advisory group will be established which will include: one representative from Communications Division, one representative from Programs and Partnership Branch and one representative from the Evaluation Unit. The role of the advisory group will be to: review the evaluation methodology, give guidance to the evaluation team to support the uptake and use of the findings, review the draft of the report, and help disseminate findings throughout the Centre.

### ***Evaluation Team***

The Evaluation Team will include two members from IDRC's Evaluation Unit and three senior external consultants from IDS with the support of a research officer. IDRC's Evaluation Unit will manage the evaluation as well as have a junior team member participate in the evaluation team with the senior evaluation consultant(s). The nature of this participation will be determined based on the proposed evaluation methodology.

## **Annex 2: Contributors' Biographies**

### **Nancy Okail**

Nancy just passed her DPhil examination at the Institute of Development Studies (IDS) on March 2009. Her doctoral thesis explored Donor-recipient power relations and the influence of expert knowledge on the dynamics of aid. Throughout her career, Nancy conducted different research activities and consultancies in the field of international development, especially in management, monitoring, and evaluation, with a specific focus on aid effectiveness, covering issues pertaining to poverty alleviation, healthcare, education, empowerment and democratization. As an evaluator, her work with the Egyptian government provided her with experience in public policy analysis and local/global interface in international aid. She also worked with several international development organizations through direct employment in projects funded by the World Bank and UNDP, and through research and consultancy, such as with the Egyptian Swiss Development Fund, GTZ, CIDA, DANIDA, the Italian Cooperation for Development, the Aga Khan Development Foundation (AKDN), and USAID.

### **Nick Perkins**

Nick is Head of Communication at IDS. He trained as a journalist and his post-graduate degree is in anthropology of development.

Nick has worked as a journalist, trainer and project manager for many years in sub-Saharan Africa. He founded Media for Development, an award-winning consultancy providing support in a number of areas of communication for development. He worked as a knowledge management and learning advisor for the World Association of Community Radio Broadcasters (AMARC) and the UK-based NGO Healthlink Worldwide.

At IDS, he has initiated an action research program on research communication and policy development strategies.

### **Peter Taylor**

Peter is a Research Fellow and is also Team Leader of the Participation, Power and Social Change Team at IDS. His background is in agriculture and education and he is a qualified teacher. He has worked for many years on issues relating to education for agricultural and rural development, and participatory approaches and processes in educational arenas. In addition to authoring two books and a number of other publications, he has been involved in a wide range of research and advisory activities including: participatory curriculum development in agricultural and forestry education; research into use of contextualized curricula and teaching methodologies in basic education; support to initiatives supporting development of education provision for people in rural areas; training of trainers and teachers on participatory approaches and methodologies; engaging in collaborative inquiry into education for community change; research on grassroots democracy and empowerment; and facilitation of distance learning events and seminars. Peter currently convenes international initiatives on "Learning and Teaching for Transformation" and "Facilitating Learning for Social Change." He recently joined IDRC to provide evaluation support.

### **Genner Llanes-Ortiz**

Genner is a Mayan anthropologist from the Yucatan, Mexico. He holds an MA in Anthropology of Development from Sussex University and is currently finishing his Ph.D. in Social

Anthropology at the same institution. He is interested in the politics of knowledge in development, indigenous movements, and intercultural dialogue in Latin America.

**Johanna Lindstrom**

Johanna is a political economist with a background in international relations and environment and development policy. She has recent work experience in the areas of monitoring and evaluation; agricultural development, food security and nutrition; pro-poor policy processes, policy influence, and the research-policy interface; and public awareness of international development. She works as Research Officer/Coordinator to the Director of IDS. Much of her current work is focused on the ALINe (Agriculture Learning and Impact Network) planning grant (see [www.alineplanning.org](http://www.alineplanning.org) for more info). Recent projects include a review of DFID and EC efforts to tackle malnutrition for Save the Children and an internal review of IDS partnerships.

## Annex 3: Documents Reviewed

<b>IDRC Documents —Evaluations, Strategies and Reports</b>	
2002	Communication and media strategy for the <b>World Summit on Sustainable Development</b> , South Africa , Sept 2002
2003	WSIS – <b>World Summit on the Information Society</b> , ICT4D and Communication Participants, Staff Evaluation, Dec 9–12, Geneva Switzerland, Dec 2003
2004	<b>World Urban Forum</b> , Barcelona , September 2004 IDRC (Draft) Communication Strategy
2005	Evaluation report <b>World Summit on the Information Society</b> (WSIS) – Phase II (2005, Tunis)
2005	WSIS – <b>World Summit on the Information Society</b> II, Tunis, 2005 IDRC (Draft) Communication Strategy
2006	Evaluation report – International <b>Forum on Ecosystem Approaches to Human Health</b> , Montreal, May 2003
2006	Report on IDRC's participation at the <b>XVI International AIDS conference</b> , Toronto, Canada, 2006
2006	Evaluation Report – IDRC's participation at the <b>XVI International AIDS conference</b> , Toronto, Canada, 2006
2006	IDRC-Partners @WUF2006 – Report on IDRC's Participation in the Third Edition of the <b>UN-Habitat World Urban Forum</b> , Vancouver, Canada; June 2006
2006	Report from IDRC's Participation – <b>The Fourth World Water Forum</b> , Mexico City, March 2006
2006	IDRC-WESC Final Technical Report – <b>World Water Forum</b> , Mexico City, March 2006
2008	<b>Global Knowledge Conference 2007</b> (GK3) Conference Evaluation, Global Action Networks Net and Keystone, April 2008
2008	Strategic Evaluation of IDRC's Participation in Large Conferences – Phase One Background Paper – How and Why IDRC Participates, by Laura Haylock, IDRC, Evaluation Unit, July 2008
2008	Evaluability Assessment of IDRC's Participation in Large Conferences, Laura Haylock, IDRC Evaluation Unit, 2007
2008	The Communication and media strategy for the <b>EcoHealth Forum</b> , Mexico, Sept 2008
<b>Literature References From the Main Document (footnoted)</b>	
	Organizational Research Services, <u>A Guide to Measuring Advocacy and Policy</u> 2007 pg2
	Granovette, M.S. (1973) The strength of weak ties. <i>American Journal of Sociology</i> , 78:1360–80.
	Eyben, R. (2008) Conferences and the winding road to Accra: Performing international aid. A paper to be presented at the seminar Knowledge practices of international development agencies, Helsinki, 22-23 May 2008.
	Kitchen, R. (2005) Commentary: Disrupting and destabilizing Anglo-American and English-language hegemony in geography. <i>Social and Cultural Geography</i> , 6:1, 1-15
	Davies, A., Merilainen S., Tienari J. and Thomas R., (2008) Hegemonic Academic Practices: Experiences of Publishing from the Periphery. <i>Organization</i> , 15, 4: 584-97

Mowels, C., Stacey R.D. and Griffin, D. (2008) What contribution can insights from the complexity sciences make to the theory and practice of development management? Journal of International Development, 20:804-20.
Ideas, Institutions and Policy Entrepreneurs: towards a new history of higher education in the European Community, Anne Corbett European Journal of Education, Vol. 38, No. 3, 2003
Ramalingam et al. Exploring the science of complexity: Ideas ad implications for development and humanitarian efforts' ODI, 2008.
Lindstrom's literature review in Annex 3

<b>Documents Referenced in the Phase 1 Report</b>
Communications and media strategy for the World Summit on Sustainable Development (hard copy only)
IDRC's role at the Johannesburg Summit (Hard copy only)
References on the General Outcome of Conference--- <a href="http://irims.idrc.ca/iRIMSTemp/FA049976-BA55-4999-AB46-C15E139B4630-2DD9/rad1AD45.MHT">http://irims.idrc.ca/iRIMSTemp/FA049976-BA55-4999-AB46-C15E139B4630-2DD9/rad1AD45.MHT</a>
Trip Report--Jean Lebel-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D17+UNC+6000">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D17+UNC+6000</a>
Trip Report--Lyn Ponniah-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D57+UNC+8130">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D57+UNC+8130</a>
Trip Report--Ola Smith-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D37+UNC+7401">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D37+UNC+7401</a>
Report on Resource Expansion Trip-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D4+UNC+6219">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D4+UNC+6219</a>
Communication Plan: International Forum on Ecosystem Approaches to Human Health--May 18--23 2003(Hard copy)
EcoHealth activities at forum-- <a href="http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/rad68DE2.MHT">http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/rad68DE2.MHT</a>
See EcoHealth binder provided by Communications (Hard copy only)
Staff Evaluation: Sent by Communications (not on IRIMS)
Trip report--Luis Barnola-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D3+UNC+10669">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D3+UNC+10669</a>
Preparatory Meeting--L.Elder-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D103+UNC+6422">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D103+UNC+6422</a>
Preparatory Document-- <a href="http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radA21F9.TXT">http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radA21F9.TXT</a>
Trip Report--Maria Brunelli-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D89+UNC+11816">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D89+UNC+11816</a>
Trip Report--Shalini Kala-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=SADIR+129%2D03%2D6+UNC+18704">http://irims.idrc.ca/irims/ViewDocument.asp?Key=SADIR+129%2D03%2D6+UNC+18704</a>
Report (preparatory meeting)--Graham Todd-- <a href="http://irims.idrc.ca/iRIMSTemp/4B9CE183-A888-436D-ABAC-25CB9F1FBE40-3DE5/rad8F91E.TXT">http://irims.idrc.ca/iRIMSTemp/4B9CE183-A888-436D-ABAC-25CB9F1FBE40-3DE5/rad8F91E.TXT</a>

Trip Report--GKP--Ben Petrazzi-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D5+UNC+6850">http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D5+UNC+6850</a>
Trip Report--Steve Song-- <a href="http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radB6F5A.PDF">http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radB6F5A.PDF</a>
Benchmarking the Plan of Action of the World Summit on the Information Society in Latin America and the Caribbean <a href="http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radA436A.PDF">http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/radA436A.PDF</a> (long document)
Preparatory meeting--Trip Report Stephane Roberge--- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D101+UNC+21744">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D101+UNC+21744</a>
Powerpoint presentation--Richard Fuchs-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=SECR+121%2D04%2D47+UNC+71436">http://irims.idrc.ca/irims/ViewDocument.asp?Key=SECR+121%2D04%2D47+UNC+71436</a>
Consulting Contract--Mr. Antonio de la Llata León-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=COMM+325%2D03%2D12+UNC+56250">http://irims.idrc.ca/irims/ViewDocument.asp?Key=COMM+325%2D03%2D12+UNC+56250</a>
Email--Lamia El-Fattal-- <a href="http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/radD063B.MHT">http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/radD063B.MHT</a>
Email--Lamia El-Fattal-- <a href="http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/rad140CF.MHT">http://irims.idrc.ca/iRIMSTemp/F8D4BA7B-F907-48E2-B61E-A21B3968EAED-5D77/rad140CF.MHT</a>
IDRC Sessions--description-- <a href="http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/rad492E4.PDF">http://irims.idrc.ca/iRIMSTemp/D4291109-E92F-4DC8-B9E7-89E7DF3A092E-0B3A/rad492E4.PDF</a>
Interview Naser Faruqui--Ottawa Citizen-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84931">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84931</a>
Interview Naser Faruqui--Ottawa Citizen-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84933">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84933</a>
Interview Naser Faruqui--Toronto Star-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84932">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D103192+UNC+84932</a>
Trip Report--Bruce Currie Alder--- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PRES+129%2D03%2D14+UNC+54086">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PRES+129%2D03%2D14+UNC+54086</a>
Trip Report--Lorra Thompson--- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=MEDIR+129%2D03%2D6+UNC+53405">http://irims.idrc.ca/irims/ViewDocument.asp?Key=MEDIR+129%2D03%2D6+UNC+53405</a>
Trip Report--Merle Faminow-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D4+UNC+56700">http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D4+UNC+56700</a>
Trip Report--Merle Faminow-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D4+UNC+56700">http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D4+UNC+56700</a>
WaDImena--competition-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=MEPRG+232%2D01%2D03%2D101806%2D016+UNC+60508">http://irims.idrc.ca/irims/ViewDocument.asp?Key=MEPRG+232%2D01%2D03%2D101806%2D016+UNC+60508</a>
Email donors breakfast--documents attached-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radEB1FB.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radEB1FB.MHT</a>
Email reception-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad72129.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad72129.MHT</a>
Email--Booth-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad19927.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad19927.MHT</a>
Email--IDRC events-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-</a>

08D3/radB0C40.MHT
Email--Kampala Participation-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radA63DF.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radA63DF.MHT</a>
Email--Luc Mougeot-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad80C45.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad80C45.MHT</a>
Email--Marielle Dubbeling-- <a href="http://irims.idrc.ca/iRIMSTemp/FA6DDD3C-47AB-45FD-B0D6-7BB2E7260712-494D/rad45265.MHT">http://irims.idrc.ca/iRIMSTemp/FA6DDD3C-47AB-45FD-B0D6-7BB2E7260712-494D/rad45265.MHT</a>
Email--Video-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radB1C96.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/radB1C96.MHT</a>
Entire Participant List-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad5F06C.PDF">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad5F06C.PDF</a>
Growing better cities--Junping Lui-speaking points-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D004+UNC+66460">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D004+UNC+66460</a>
Guidelines for developing Networking Events-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74499">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74499</a>
Trip Report--Kristina Taboulchanas-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad41E1E.PDF">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad41E1E.PDF</a>
Trip Report--Walter Ubal--Preparatory meeting-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D12+UNC+35836">http://irims.idrc.ca/irims/ViewDocument.asp?Key=LACDIR+129%2D03%2D12+UNC+35836</a>
WUF Booklet--Key Messages-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D012+UNC+74463">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D012+UNC+74463</a>
WUF--Summary Report of Participation-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74564">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74564</a>
WUF--Summary Report-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74564">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+232%2D01%2D102631%2D002+UNC+74564</a>
Email from Lucy Grey Donald--contains final and evaluation report-- <a href="http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad62E39.MHT">http://irims.idrc.ca/iRIMSTemp/D5231812-3A90-48BD-8FD7-8BF84B5E77E3-08D3/rad62E39.MHT</a>
Trip Report - Ana Boischio-- <a href="http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D62+UNC+73586">http://irims.idrc.ca/irims/ViewDocument.asp?Key=PPB+129%2D03%2D62+UNC+73586</a>

## Annex 4: List of Interviewees

### IDRC

1. **Eileen Alma** Program Officer SOCIAL AND ECONOMIC POLICY
2. **Rawwida Baksh** Program Leader WOMEN'S RIGHTS AND CITIZENSHIP
3. **Roberto Bazzani** Regional Program Officer
4. **Dominique Charron** Program Leader ECOHEALTH - Ecosystem Approaches to Human Health.
5. **Brent Herbert-Copley** Director SOCIAL AND ECONOMIC POLICY
6. **Anna Dion** Research Officer GEH - Governance, Equity and Health
7. **Pauline Dole** Senior Public Outreach Officer PUBLIC AFFAIRS
8. **Lamia El-Fattal** Senior Program Specialist
9. **Jean-Michel Labatut** Senior Program Specialist ECOHEALTH—Ecosystem Approaches to Human Health
10. **Jennifer Pepall** Chief, Public Affairs and Government Relations PUBLIC AFFAIRS
11. **Andrés Sanchez** Senior Program Specialist ECOHEALTH—Ecosystem Approaches to Human Health
12. **Chantal Schryer** Director COMMUNICATIONS
13. **David Schwartz** Partnership Officer PARTNERSHIP AND BUSINESS DEVELOPMENT
14. **Christina Zarowsky** Program Manager RESEARCH FOR HEALTH EQUITY

### IDRC Partners/Consultants

15. **Beatrice Briggs** Senior Consultant International Institute for Facilitation and Change
16. **Francisco Cos-Montiel** (lead organizer in Mexico) Decentralization Forum
17. **Allison Hewlitt** Global CoPEH sessions facilitator
18. **Melissa McLean** (chair of the policy recommendations working group) Decentralization Forum
19. **Tara Mirel** Senior Consultant International Institute for Facilitation and Change
20. **Horacio Riojas** National Institute of Public Health– Mexico
21. **Colin Soskolne** Chair: Call for Action and Synthesis process (EcoHealth)

# Annex 5: Literature Review on Large Conferences

## Introduction

*‘What is the value of attending real-life conferences? The answer ought to be ‘priceless’*  
(Cumbrowski 2008)

Conferences, of any type, seem to be becoming increasingly frequent events. At a global level, there are more and more UN summits and conferences (Schechter 2005, Seyfang and Jordan 2002/2003) and internationally and nationally, there seems to be a proliferation of conferences within all academic and professional fields and they form a large part of a researcher’s working life (O’Brien 2008, Jacobs and McFarlane 2005). Yet conferences seem to be a relatively under-researched domain and, as noted by Laura Haylock in her report, the literature on conferences is limited. I have however managed to find some valuable material that form the basis for this review, which focuses on the wider literature on conferences and meetings, their functions, their role in the policy process, their influence and impact, and how this can be measured.

Mainly due to time constraints, limitations of the literature and perhaps also methodology,<sup>25</sup> some of the issues in the work document have not been covered—please see the section below “Other Issues” for further details. This includes a discussion of autonomous and invited spaces, a discussion on the role of communications in conferences, and a specific focus on the legitimising of outcomes of large conferences. Although the literature on UN summits forms the majority of the literature on conferences and Seyfang talks about the legitimising function as a core function of summits, this is not really analysed in such a way as to provide a useful conceptual framework for understanding conferences in general. Due to the fact that this area is relatively under-researched, I have included a discussion of literature that may not be directly relevant to the scope of work paper, but that I still feel is relevant to IDRC’s participation in large conferences.

Within these limitations, this review has the following scope:

- It looks at conferences and meetings in general. I have not focused on a particular type of conference and the review goes beyond both the general and IDRC-specific typology in Haylock’s report.
- It includes perspectives from a variety of academic disciplines, and goes beyond academia, looking at perspectives from practitioners of various professions, civil society etc.
- It focuses on the following question: What conceptualizations provide analytical lenses to help judge the value of large conferences related to IDRC interests?
- It compares these approaches to IDRC’s ultimate objective of enabling research to contribute to policy formation and the IDRC approach to evaluation and learning.

The review starts with a brief look at the different types of conferences and meetings examined in the literature, in order to put the rest of the review in context. It continues with a discussion of the three main identified areas of functions of conferences (influencing [role in the policy

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<sup>25</sup> This was mainly an internet search exercise, with a focus on looking for literature on conferences, rather than looking at specific areas of literature and trying to find references to conferences. The reason was the short time frame, but also due to the fact that I was aware of the limited amount written on the subject and thought it more useful to find specific articles written on conferences.

process], learning and knowledge creation, and networking) and then looks at how the impact of conferences can be evaluated depending on the objectives of the conference. There is also a section on further issues that may be of relevance. The review concludes with a "so what" for IDRC, which compares the approaches discussed and how they fit into IDRC's understanding of social change, the policy process, and IDRC's approaches to learning and evaluation.

## Typology

Although the scope of this literature review is very broad and encompasses any type of conference and we agreed that it was not worth trying to construct any structured typology at this stage, the following list provides a brief typology of the conferences in the review in order to put the literature into context:

- **UN conferences:** As explained above, the bulk of the literature looks at UN global conferences or UN summits. In the sense that IDRC and IDRC research partners participate in UN summits and the fact that there are some generalizable lessons from such events, this field has been of some use. However, much of this literature is very specific and looks at the impact of specific events as part of global governance and it has not been very useful for understanding how conferences are valuable tools for IDRC in general.
- **Academic conferences:** Much of the rest of the literature deals with academic conferences, both in the natural and social sciences. Although I have not found anything specific on development research conferences, these articles have been particularly useful.
- **General conferences:** Some articles deal with conferences in general, be they academic, professional, or academic-practitioner conferences.
- **Strategic fora:** Tepper's discussion about the role of strategic fora in the policy process is even wider and encompasses any type of meeting ranging from a special commission to a summit, including any type of conference. His article includes a typology of 29 different types of meetings across several fields (2004:525–528). Although this article is focused on U.S. domestic policy it has a general discussion of the role of strategic fora in the policy process.

## Functions of Conferences

The review of the literature has revealed three main areas of conference functions that are explored in greater detail. This is not an exhaustive list of functions, but addresses those that are most relevant. Other functions touched on in the literature include: contribution to conferences as important for the development of academic researchers or other types of professionals' career development (to get known in their field); to find out about resources in the field of relevance; to become more professional—particularly of relevance for researchers and professionals (Jacobs and McFarlane 2005, Pells 2007); to promote a product (Cumbrowski 2008); and those core functions of UN summits as described below. As discussed in a meeting of the IDS team, I have not attempted to link the functions or objectives to the different players involved in conferences (e.g. participants or organizers).

### ***Conferences as a Means of Influencing Policy—The Role of Conferences in the Policy Process***

Much of the literature reviewed focuses on the potential for conferences to act as strategic fora for policy influence, as identified by Haylock (see box below), Tepper (2004), Schechter (2005), and Seyfang (2003).

## Overview of the Role of Large Conferences for Influencing

Laura Haylock's summary of the policy influence of conferences—references included below (2008:14–15):

Conferences, particularly UN summits, often take the shape of a forum—a strategic arena to influence policy. There is little evidence to suggest the presence of a causal link between one specific event and concrete policy creation; however certain scholars argue that open-ended strategic forums or forums designed with the purpose of sustained follow-up are more likely to have an impact on policy (Lavis et al. 2005, Tepper, 2004, Klein 2003, Ginsburg and Plank 1995). Moreover, events are likelier to influence policy when they create more than just a big splash and are able to sustain attention over extended periods of time (Ginsburg and Plank, 1995). Interest and dialogue that starts in a conference and is maintained over extended periods of time can foster a two-way exchange process between policymakers and researchers and create a cultural shift (Lavis et al. 2005). A decision-relevant culture can be instilled among the research community, and an evidenced-based culture can be created among policymakers (Lavis et al. 2005). Thus, the effectiveness of a conference particularly related to policy influence cannot simply be measured in the microcosm of the two-or-three day event. Instead conferences should be seen as an event that is part of an extended process that extends over years not days (Klein 2003). Although conferences may have very little to do with the daily push and pulls of politics, they are an arena where innovative ideas can be discussed and tested. These new ideas may have the potential to open certain policy windows. As argued by Tepper, if a political structure is closed to certain ideas —...strategic meetings can serve as wedges to open windows that might otherwise remain closed (2004: 530). The dynamic, interpersonal nature of a conference can also help to open these windows. Lavis et al's experimental design study suggests that opportunities which allow policymakers and academics to engage in face-to-face dialogue about a set of findings is more effective in terms of knowledge uptake than when policymakers are presented with written material (2003). While some conferences, particularly UN summits, create Action Plans that are not always accompanied with full implementation processes, the strategies endorsed by the conferences are, argues Klein, imbued with prestige (2005). Particularly with UN summits that integrate civil society actors into the summit process, the products can be seen as statement with a certain amount of international consensus. Klein contends that these legitimated ideas are more easily advocated and implemented in policy arenas (Klein 2005). How, then, does the nature of large-scale conferences help shape policy? Tepper synthesizes the potential benefits of large-scale conferences into 7 key opportunities. Large conferences can help shape policy by:

- 1) helping to frame or reframe a problem;
- 2) calling attention to new and important research;
- 3) creating and sustaining communities of experts;
- 4) softening up audiences for a new idea or proposals;
- 5) sustaining the momentum for an idea during political fallow times;
- 6) fostering policy transfer and knowledge uptake; and
- 7) helping policy entrepreneurs test ideas, develop meaningful and influential contacts and networks, and predict or plan for the opening of future policy windows (Tepper 2004:540)”

Expanding on Haylock's discussion, it is worth briefly discussing the core functions of UN summits, or specifically of environmental mega-conferences. According to Seyfang (2003), UN summits have six functions:

1. Setting the global agenda
2. Facilitating joined up thinking
3. Endorsing common principles
4. Providing global leadership
5. Building institutional capacity
6. Legitimising global governance

These six functions are quite specific to these types of events, but a few of them are relevant for the purpose of analysing the policy process of conferences in general, particularly the agenda-setting function which is also mentioned by Tepper (2004). Schechter characterizes global conferences as "change agents or even agents aimed at bringing the moral force of the UN to bear on particular issues" (2005:8). UN conferences seek to raise global consciousness and to mobilize international, national, and local NGOs to influence policy nationally and in some respects make international policy. Conferences provide NGOs with additional access points into the policy process—they are spaces where NGOs can lobby national governments, but also bypass national government, by influencing international policy making, according to Martens (2000:116).

Tepper uses Kingdon's agenda setting/ multiple streams policy process model and looks at how strategic meetings fit into this. In the problem stream (the set of issues that government, media, and the public see as pressing and in need of attention), meetings might draw attention to new problems, highlight overlooked problems, and bring important research to the attention of policy makers. In the policy stream (the set of policy alternatives being considered and debated at any one time), meetings can provide inputs into the intellectual core of the policy making community in terms of producing recommendations, providing a place for policy communities (from experts to policymakers) to interact with each other, and also providing tipping points—spaces where ideas diffuse through the policy-making community and take hold. Tepper argues for the importance of well-timed meetings for this to happen (2004: 529–530) and this resonates with much of the literature on the policy process and the importance of strategic opportunism (see Sumner, Perkins, Lindstrom forthcoming). Finally, in the politics stream (the extent to which policymakers are receptive to new ideas), meetings can sometimes serve as wedges to open windows that might otherwise have remained closed, by getting different political groups together and creating opening for new ideas. Regular meetings can also serve to keep ideas alive in policy makers' minds and when there is an opportunity to act they will. Regular meetings can also be used opportunistically by politicians to provide outside validation for their policy (Tepper 2004:530), in the spirit of Weiss's political model for research utilisation (Weiss 1991).

Tepper also looks at the crucial role that meetings play for Dye's approach to policy communities as elite actors or as policy entrepreneurs and for theories of policy transfer (between countries) and knowledge uptake. Policy transfer, he argues, is unlikely without face-to-face dialogue between policy makers and policy makers are more likely to act on new research ideas when they are presented in person (2004: 532–533).

Tepper's is the only example of conferences being situated in a specific policy process model, but this could of course be done with other models, such as the KNOTS or RAPID model. In sum, it can be said that meetings—or for the purpose of this review, large conferences—play a critical role in the policy process, largely due to the fact that they provide an opportunity for the influencer (be it a researcher, policy entrepreneur, or a NGO) to come face to face with policy

makers. As Haylock summarizes, conferences are more effective at influencing policy when they are open-ended with sustained follow-up—they can then foster a two-way exchange between policy makers and researchers and create a cultural shift (bridging the cultural gap that often exists between researchers and policymakers [Neilson 2001]). Tepper also argues that conference recommendations need to be specific to appeal to policy makers; they should also be based on credible evidence and geared toward the practical needs of policy makers stating reasons and implications for each recommendation. Recommendations should also try to take advantage of policy windows and reflect the consensus of the political establishment. But he also argues that more research is needed to understand the conditions in which meetings are effective (2004: 534–540).

### ***Conferences as Spaces of Knowledge Creation and Learning***

One area of the literature that proved very useful was articles focusing on conferences as managed occasions for learning, supported by knowledge sharing and knowledge building. The articles vary in the type of conferences that they focus on (Wiessner et al., Graham and Kormanik, Jacobs and McFarlane, Aiken).

Jacobs and McFarlane (2005) focus primarily on academic conferences and use the theories of sociology of scientific knowledge (SSK) and socio-cultural theory to conceptualize the role of conferences within scientific enquiry. With the sociology of scientific knowledge, there are three stages of conduct and resolution of scientific controversy within which conferences have their place:

1. Interpretative flexibility—conferences are places where particular interpretations are attached to research findings.
2. Closure mechanism—conferences are places where consensus is reached on the truth of a scientific finding by the action of social and rhetorical moves.
3. Relation to wider interests—the closure mechanisms at conferences are impinged by wider social structures and processes.

Looking at socio-cultural theory, learning takes place through active participation in a social and cultural activity, which is situated in a “community of practice.” When equating learning with knowledge building, conferences can be seen as, at least, temporary communities of practice, or knowledge building communities. Bringing these two perspectives together, Jacobs and McFarlane argue that “conference participants constitute a temporary knowledge building community whose practice is the negotiations of interpretations, agendas, methodologies, facts and so on. The difference, of course, is that formal learning has a structured corollary (teaching), whereas research and professional practice does not” (2005:318). Conferences, in this view, are conceptualized as managed events for:

1. The formal presentation of recent developments in the field.
2. The community evaluation of those developments (both substantive and methodological).
3. The informal presentation of other relevant developments from the community, e.g. from the conference floor.
4. Discussion of the interpretations and implications of those developments.
5. Settling disagreements over these interpretations and implications.
6. Doing 1–5 according to the practical organization of a reflective community of practice.
7. Inducting inexperienced members into the community of practice by making aspects of practice explicit and therefore capable of being apprehended.
8. Ensuring that, as a whole, research and/or professional practice progresses both substantively and methodologically.

This is a very idealized view of conferences, one that perhaps does not bear out in practice. Graham and Kormanik (2004) (from the perspective of being practitioners of Human Resource Development [HRD]) argue in more of a think piece that the field of HRD needs to think more carefully about how conferences can become spaces more conducive to learning and knowledge building. As practitioners, they are frustrated by the lack of actual dialogue between researchers and practitioners at conferences, which often plays out as no more than presentations of complex research, which do not focus on conclusions and implications, followed by short Q&A sessions. This view is also supported by Jacobs and McFarlane who argue that this type of event can hide the social context within which scientific knowledge is embedded and multiple interpretations have little opportunity to emerge (2005: 328). In order to correct this and to bridge the gap between researchers and practitioners at conferences, Graham and Kormanik make a number of practical suggestions that include changing the structure of conferences, to ensure that keynote speeches are followed by enough time for reflection and discussion as well as more time for information interaction; encouraging speakers to include a minimum amount of deliberation on practical implications of their research; and training for chairs to facilitate discussions (2004:392).

### **Conferences as Networking Opportunities**

One function that emerged strongly from all the different perspectives on conferences was the role of conferences as opportunities to network. The UN literature on women's conferences shows this as a particular function. Although it might not be an explicit objective of the conference organizers, such conferences have been essential to the building of global social networks (Schechter 2005, Chen 1995; Davis 1996; Martens 2000). The science literature also supports this claim. Aiken's longitudinal study (see below) showed that a large percentages (up to 60 per cent) of attendants at scientific conferences had new research collaborators as a result of attending the conference. What I have found from a business perspective also strongly supports this view—both Taylor and Cumbrowski argue in their blogs that the networking opportunities that conferences provide are critical to the success of the businesses:

"You can call this the art of small talk, but in fact being able to establish a one-to-one personal connection with other professionals in your field is *critical* to being a success. They're not **customers** or **vendors**, after all, they're **people** [original emphasis]." (Taylor 2005)

—The single most important reason for me to attend real-life conferences is to do something that cannot be replaced by the best communication technology available: human interaction, meeting people face-to-face and getting to know strangers across different verticals that you would not have bumped into otherwise. Nobody will or even can do business with everybody who you meet and get to know at those conferences, but that is also not the idea behind this." (Cumbrowski 2008)

### **Outcomes/Impacts of Conferences**

Much of the material reviewed discussed the possibility of assessing the impact and value of conferences to investigate much of the criticism (specifically related to UN summits) that has been levied at these events as waste of time and money. The assessment of impact will depend on the conference objectives, but also on what aspect of the conference is being assessed and what types of impact are considered.

The literature on UN conferences addresses this mainly on a case-by-case basis, showing influence on global awareness of problems; national and international policies and legislation; and institution building and mobilisation of social networks (Schechter 2005; Davis 1996). Tepper's analysis shows that meetings do have policy influence in these areas, but claims that there is not enough evidence yet to say whether they are effective at reaching their objectives (2004). Schechter does discuss the challenges faced when trying to assess the impact of UN conferences, including problems with defining social change impacts, conflicting conference objectives of various parties, short time frames, issues of attribution, and unintended impacts (2005:3)—challenges that correlate to many of the methodological issues identified in the policy process literature (Sumner et al., forthcoming). Haylock also argues that the effectiveness of a conference (particularly related to policy influence) needs to be looked at from a longer-term perspective, especially due to the open-ended nature of many conference processes, which of course adds to the methodological challenges of assessing impact.

Although such case-by-case methodologies may be the most useful for assessing impact, the literature referenced above contains mostly anecdotal evidence and the cases discussed have not been examined particularly systematically. There are, however, a few attempts at developing methodologies for evaluating the impact of conferences, each depending on the objective of the conferences in question.

Wiessner et al. (2008) have developed an innovative approach called New Learning (NL), which aims to synthesize evaluation with active learning. Similar to the articles discussed above, this approach goes beyond looking at conferences as spaces for knowledge sharing and reframes conferences as spaces where knowledge is created and evaluation becomes a method of knowledge creation. The methodology involved pre-conference activities where the project team communicated through conference literature to describe the theoretical foundations and provide rationale for NL as an evaluative tool for the conference. At the conference, the NL project was visible through banners, flyers, tote bags, and staff t-shirts. The evaluation used data from NL forms (focusing on what participants learned and how learning took place), semi-structured interviews, participants' observations, document analysis, and a scatter-gram where participants indicated their status (researcher/practitioner, novice/expert) (2008:367–374). I will not detail the results here, as they referred specifically to a Human Resource Development conference, but this methodology would be a way of expanding standard conference evaluation to something that can be really useful to assessing whether conferences are effective. It should be noted that this approach is only really appropriate when learning is an explicit goal of the conference and conference organizers must also be able to take ownership of the learning outcomes and take the agenda forward (2008:379). Although the case used to explore this new approach was limited in the sense that the researchers were not able to affect the conference planning and organizing in order to create a space for conducive to learning, this approach could be applied to inform conference planning.

Spiegel et al. (1999) uses a similar technique for evaluating a professional conference, here referred to as responsive evaluation. Responsive evaluation in this case is characterized by use of ongoing, interactive communication between the evaluators and the participants, the attention the evaluators pay to the conference participants and their perspectives, the qualitative nature of the information gathered, and the integration of the evaluation into the conference. Methods included conducting brief interviews, limited to two or three questions, during session breaks; taking and displaying photographs of participants, speakers, and various activities during conference sessions; and administering a non-traditional feedback evaluation form to participants at the conclusion of the conference (1999:58–59). This evaluation is different from

Wiessner et al. s in the sense that it does not focus specifically on learning outcomes, but allows participants to formulate their own views of the conference and consequently, could be adapted to different conference objectives.

Aiken (undated a) takes a very different approach to conference evaluation, one that is quantitative and focused on an attempt of exploring the cost-benefit of conferences. This was done by conducting a longitudinal survey of conference participants. This was perhaps not particularly innovative, but the questions were focused on measuring the impact of the conference based on the objective of the conference organizers' Keystone Symposia: To connect the scientific community for the benefit of society, for example, or to catalyze scientific progress and accelerate achieving research goals (Aiken undated b). The questions posed focused on whether conferences had potential to or had encouraged research collaboration and sharing of information, impacted on research (new ideas, directions, advancement of science, time and money saved), and impacted on careers. Follow-up surveys were then conducted at nine and 18 months after the conference to assess progress against these initial questions. Aiken includes a question about time and money saved and makes a calculation that suggests that Keystone Symposia s conferences causes \$20-\$30 million in research funds to be diverted to more effective uses per year. This assessment is very shaky in the sense that it relies on conference participants being able to assess what their savings are and being able to assess the value of time (Aiken undated a), but the rest of the evaluation is useful in terms of assessing the effectiveness of conferences.

## Other Issues

Due to the limited time committed to this review, I have not been able to cover all the issues listed in the scope of work paper and others that we have discussed. The most relevant areas are discussed briefly here, in order to guide further work on the review.

**Autonomous and invited spaces:** This is potentially an interesting area of the participation literature that I have not managed to cover. The list of references include a few articles that may be of relevance—mainly from the IDS Participation Team.

**The role of media in conferences:** I did not manage to find anything relevant on this subject (maybe mostly due to my lack of expertise in this area), but after a team discussion we realized that the OURMedia Network (<http://ourmedianetwork.org/?q=node/32>) may have some insights on this.

**Specific conference evaluations:** There may well be other conference evaluations out there that could provide useful lessons for this review, but one of the limitations of using the Internet to conduct a literature review is that not everything can be found online.

## Conclusion

It seems that there are some useful lessons for IDRC, and particularly for the Evaluation Unit, on the functions of conferences, their role in the policy process, their influence and impact, and how this can be measured.

According to Carden (2004) and Neilson (2001) IDRC defines research influence as influence on public policy of four types:

- expanding policy capacities;

- broadening policy horizons;
- affecting policy regimes; and
- developing new policy regimes.

Where influence is regarded as being on a continuum with direct impact on legislation or particular government decisions on one end, to changing the prevailing paradigm on the other. This review has shown that conferences play a large role in the policy process in general. The role of conferences within this model needs to be articulated in more detail, but it is possible to see correlations with Tepper's approach.

Although the scope of work paper highlighted the strategic importance of research influence on public policy, the learning and knowledge creation functions of conferences seem particularly relevant for IDRC. Based on my previous experience of IDRC, there is a strong focus on learning within the organization. The Evaluation Unit might also consider adapting the approaches of Wiessner et al. or Spiegel et al. to conference evaluation to ensure that such learning is captured and acted upon.

## References (not all cited)

### *International Relations/Development Studies*

Chen, M. A. (1995): Engendering world conferences: the international women's movement and the United Nations, *Third World Quarterly*, Vol. 16, No. 3.

This article looks at how the women's movement has managed to influence UN conferences and the strategies that have been used to maximize influence.

David, S. (1996): Making Waves: advocacy by women NGOs at UN conferences, *Journal of the Society for International Development*, Vol. 3.

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This article is one of the first attempts to respond to calls to assess the usefulness of UN conferences. It looks at the nature of these conferences and their roles and functions in the context of multilateral diplomacy and starts to make a qualitative assessment.

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# Annex 6: Ethnographic Study of a Large Conference: EcoHealth Forum, Mexico, 2008

## Methodology

Based on the review of the Phase 1 report as well as the primary literature, we started preparing our methodology for the live conference case study of the International EcoHealth Forum, December 1–5, 2008. The live conference approach was seen as a good opportunity to observe the dynamics of such events and observe the different aspects explained below.

In order to assess this conference as a case study, we had to explore three phases (pre, during and post conference).

### ***Pre-Conference Phase***

This phase included an examination of the background documents of the conference, reviewing past evaluations to identify the objectives for holding the conference *from the organizer's perspective*.

The following is the range of elements we developed as a basic guideline for observation and interviews during the event and consideration of the different perspectives of both organizers and participants:

- Dynamics—interpersonal nature of conference.
- Personal and corporate interests expressed by participants and/or organizers, and the different strategies they employed to express them during the event.
- Dialogues at play within the formal and (if possible) informal spaces of the conference.
- Strategies (theoretical devices, policy discourses, etc.) utilized by organizers and/or participants to advance their opinions and agendas.
- The type of participants invited (NGO and government representatives, high profile researchers, decision makers, etc.) and how they perceived the capacity (and objective) of their presence.
- Existing communities and new communities being formed as result of the interaction of participants and/or organizers
- The process of reaching a consensus—if any. Who actually participates in producing it and how? (production and legitimation of knowledge through large conferences).
- Recommendations resulting (if any) from face-to-face exchanges at the conference. Particular knowledge management, communication, and educational practices (facilitation methodologies, roundtable formats, mediators' roles, etc.).
- Time/space left for participants for absorbing and reflecting after keynote speeches and presentations.
- Negotiations of policy or research interpretations and how they reveal themselves in the conference and in conference.
- Networking opportunities and the way they are constructed, promoted, or deterred by the conference format.
- Since we are focusing on large conferences and not all types of meetings, the political budgeting of the conference (investment, services, facilities, venue, number of participants, etc.) should be taken into account. How is it taken advantage of? How does it benefit the goals of the conference and encourage/discourage the participation of attendants?

- The significance of the timing of the conference in relation to the topics under discussion (convenient or strategic?).

### ***During the Conference***

This phase of the study was conducted by two researchers in our team by following a detailed ethnographic research strategy in observing, interviewing, and having informal conversations within and outside the conference venue.

Our ethnographic study started with the flight to Mexico, when our two researchers shared a connecting flight with some of the participants and ended with the return flight with the same group of people. This was an excellent opportunity to compare expectations before the conference and reflections afterwards. During the conference, the research team had easy access to the different formal and informal spaces and was able to gain very rich insights for the evaluation, as will be explained in detail in the next section.

### ***Post-Conference Phase***

This phase was based mainly on two parts:

**Part 1:** Conducting 18 follow-up Skype interviews with key IDRC staff from the Program and Partnership Branch, communication and partnership division, for their views on IDRC participation in general, but focusing on the most recent large conferences in which IDRC has participated: the International EcoHealth Forum, Merida, Mexico, December 1–5, 2008; Decentralisation, Local Power and Women’s Rights: Global trends in participation, representation and access to public services, Mexico City, 18–21 November, 2008; and the Global Ministerial Forum on Research for Health, Bamako, Mali, November 17–19, 2008 (see Annex 1 for a list of in-depth personal and Skype interviews with IDRC staff and organizing partners and consultants).

**Part 2:** Reviewing over 25 documents, including communications strategies, evaluation reports, policy briefs, final reports, and trip reports of the above conferences and 12 previous conferences, including those reviewed in Haylock’s report (see Annex 2 for a list of documents). These documents provided very useful insights that complemented the overall pictures that we developed.

## **Methodology Limitations**

The original plan was to conduct an ethnographic study of the two live conferences that were scheduled to be held in Mexico in December 2008. However, the organizers of the Decentralisation Conference decided to hold it earlier than planned. This made it logistically difficult for us to study the two conferences. Such an opportunity would have enabled us to gain further insight and draw comparisons between the two conferences. Nevertheless, we were able to access very rich data from the Decentralisation Conference and the Global Ministerial Forum on Research for Health in Bamako through our interviews in the follow-up phase.

In general, this evaluation should not be seen as a comprehensive study of IDRC participation in large conferences and the views expressed here are limited to the scope outlined in the previous section.

## ***The Narrative***

This section represents our observations and the different views expressed during the live conference as well as those in the reviewed documents; our analysis will come in the following section. Although the discussion is built mainly around the ethnographic details of the EcoHealth Forum, this is not an evaluation of the Forum. The discussion will also include comments and views expressed about the different issues raised in the post-conference phase of the study, including a compilation of opinions gathered from the other two conferences we have explored through the follow-up interviews, and referring to reviewed documents whenever necessary.

The following ethnographic account is based on a series of observations, interviews, and conversations conducted during the International Forum on EcoHealth between the 29th of November and the 6th of December, 2008 in Merida, Mexico. This account is based on interviews and informal conversations with nearly 60 participants and attendants conducted by two of our research team, and participant observation of 30 different academic and informal spaces, including plenary sessions, poster presentations, panel discussions, closed meetings of organizers and formal networks, and a site visit to Celestun.

### ***Background to the International EcoHealth Forum (IEF)***

According to convenors of the conference, EcoHealth—short for ‘Ecosystem Approaches to Human Health’—is a research framework that addresses how human health and environmental quality are determined by complex relationships among different components of an ecosystem. It is used to explore how human health can be protected and improved through more sustainable ecosystem management. Researchers work across academic disciplines to develop sustainable solutions that transcend the health sector. EcoHealth approaches help translate research findings into policy and action.

The IEF 2008 was jointly organized by the National Institute of Public Health of Mexico (INSP)—also the official host of the event—and the International Association for Ecology and Health (IAEH) the Oswaldo Cruz Foundation, Brazil (FIOCRUZ), Instituto de Pesquisas Ecológicas, Brazil (IPÊ), the University of Sao Paulo, Brazil (USP), and the International Development Research Centre (IDRC). For IDRC, it was a follow-up conference to the EcoHealth Forum in Montreal in 2003. It was also held in conjunction with the second biennial conference of the IAHE.

As stated in the Forum’s communication strategy, the target audiences were the media (primarily Latin American and Canadian journalists), policy makers and decision makers at all levels, practitioners, researchers, students, representatives of development organizations, and donors.

As explained by different researchers during the Forum, briefly, EcoHealth advocates transdisciplinarity and a participatory approach addressing the relationship between the environment and human and nonhuman health. The EcoHealth approach, sometimes referred to as “ecosystemic”—mainly by Spanish speakers—has been promoted by IDRC in different regions of the world since 1996. In contrast to the traditional view of previous research on the relationship between health and the environment, EcoHealth recognizes the complexity and interrelation of the physical and social world. Ideally, this approach is inclusive of the collaborative work of natural and social scientists, activists, indigenous groups, and policy

makers. The concept is promoted by IDRC and was formally introduced through the first EcoHealth Forum in Montreal in 2003.<sup>26</sup>

The main objectives of the conference<sup>27</sup> were to:

- reaffirm IDRC as a leader among development organizations in the field of EcoHealth—and emphasize the fact that the IDRC approach focuses on human health and poverty alleviation;
- help inform IDRC programming by identifying gaps in research methodologies, intervention design, and implementation and policy development linked to EcoHealth;
- provide an opportunity for IDRC researchers to network, present their research results to several audiences, and build their capacity to communicate better;
- contribute to the broader communications objectives of the IEF;
- engage with decision makers at all levels;
- further the impact of research findings on health and environment policies; and
- demonstrate that “EcoHealth works”—that the methodology produces results and makes a difference.

Through our interviews, the above activities were confirmed as objectives of the conference, although some respondents prioritized various objectives over others. Nevertheless, showcasing the results of research supported by IDRC and confirming the Centre’s expertise in these areas were generally seen as priority objectives. Most respondents recognized that policy influencing was one of the main aspirations. However, it was clearly stated by almost everyone we met that this did not mean that simply holding the conference and bringing together policy makers, researchers, and the media would necessarily influence policy. Opinion ranged from the many who adopted the view that, “there is no way this gathering, no matter how large, will influence policy,” totally ridiculing the idea, and others who had a more informed understanding of the connection between the Forum and policy influencing. As explained by one of the IDRC program officers, “the EcoHealth concept was fairly new—in Montreal, the objective was to introduce the idea, while here the main objective is creating a critical mass around the issue and developing a more elaborate understanding of the approach. It is very important to gain the support of policymakers, although they will not be influenced just by attending.”

Several others shared this understanding and considered that IDRC’s participation in large conferences should not be seen as a stand-alone tool for policy influencing, but as part of a continuous process of follow-up efforts for further engagement and the fostering of networks activities. As expressed by one of the program leaders, “[t]he large conference is very important for policy influencing. . . . it should be seen as the spark to initial the fire [sic], but it has to be continuously fed to have significant sustained effect.”

### ***Pre-Conference Phase: Organization, Communication, and Partnership***

IDRC aimed to have Southern partners take the leading role in organizing the conference and the above-mentioned participating organizations were selected through a competitive process. The aim was not just to select an experienced organization that would facilitate the conference as required; IDRC wanted to select a group whose participation would help them move forward in developing their own programming and better position them to continue to develop the

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<sup>26</sup> This is not an official definition of EcoHealth, but a view formed from the explanations of different participants at the conference and, as will be explained later, there are other interpretations of the concept.

<sup>27</sup> These are based mainly on the conference’s communication strategy, its agenda, and the Forum’s website.

EcoHealth approach. Although there were preceding communications and an elaborate process of selecting the organizers of the conference, the EcoHealth Conference Planning Team Meeting, from the 29th to 30th of January 2008 in Cuernavaca, Mexico marks the beginning of consolidated preparation work for the conference, in which all the participating organizations took part. Local organization, communications, international advisory, and advisory committees were subsequently set up. The critical issues were to establish congruence between the different roles of the committees. Although such a set up was created with the purpose of handing over the implementation of the conference to the selected organization, IDRC still had a major role to play; the communications team also played a central part.

As expressed through most of the interviews, having several different institutions involved in the process of organization meant that it was always likely to become very complicated. Although, deliberate efforts were made to clarify roles and establish a unified vision of the conference, the communication process took up a lot of time and effort. Having multilingual organizations was another source of complication and delay, and both the members of PPB and the communications group had to make an extra effort to maintain the flow of the process.

This view was shared by the organizers of the Decentralisation Conference and the Global Ministerial Forum, who had even more actors involved, since IDRC was not the only donor in these cases. The analysis of Haylock's report also favours holding conferences that are mostly led by IDRC, rather than those with multiple partners. Nonetheless, from the partnership point of view, engaging with several institutions on different levels in organizing and funding conferences provides a great hands-on opportunity to strengthen partnership ties and create new ones. This is also seen as a method of organizing conferences that increases the opportunity for influencing not just policy, but other organizations with interests in the same issues.

It was noted in one of the interviews that, "Although dealing with multiple organizations is extremely exhausting and time-consuming and it is much easier and smoother if IDRC is taking the lead, partnering with other organizations in preparing for forums and conferences provides many opportunities, including passing on our corporate culture to our partners, which they would hopeful[ly] adopt and follow."

In all cases, it was unanimously agreed that preparing for and organizing conferences and forums on this scale was a full-time job and should not be considered as one of the duties of the regular workload of those involved. Most interviewees expressed their concern about how much these processes took up their time, which was already fully accounted for by following up on projects, preparing reports, supporting partners, and all the other core tasks of their programs.

## ***During the Conference***

### ***The Forum Venue***

Merida has been promoted as a "conference resort" since the 1990s and successive local governments of different political persuasions have built or facilitated the creation of urban spaces for the hosting of national and international conferences.

The Fiesta Americana and Hyatt Regency were specially chosen by the organizers to be the physical spaces for the conference. These two hotels had the advantage of a large number of rooms, modern facilities, and being close to high-quality urban and tourist services. Indeed,

they were the most expensive hotels in town, though not the most costly in the region.<sup>28</sup> With more than 700 international delegates expected to attend, to accommodate them in these two hotels—one across the street from the other—seems to have been a decision based on practicalities.<sup>29</sup>

The highly sought-after architectural harmonisation of the Fiesta Americana had a significant impact on many attendants at the conference. While many of the organizers, as well as the participants, were happy with the conference venue in general, we overheard many conversations in which attendants accommodated at the Hyatt Regency wished they were staying at the Fiesta Americana instead, a place with more “character” and “identity.” One lecturer from an African university commented in an interview that he wished they were staying in a different place, closer to the “real people” and “the real Merida.” For some participants, these hotels were too overwhelming and expensive. The luxurious and first class exteriors and the fact that every extra service was charged separately from the main bill were mentioned as reasons for this. Alternative places were thought to be more appropriate.

This is what was expressed by members of one of the professional groups said during their work sessions after the conference, which were held in an alternative hotel called Los Aluxes, a smaller place located in the historic downtown of Merida. Here, one of the coordinators of this Latin American network said, —“You can notice, unlike the other hotels where we were staying before, here we have free Internet, and the windows can be opened. We are not *locked up* like in the other hotel<sup>30</sup>. . . and the food is good too.” This joking remark hinted at what other people felt as well during the event. Another African researcher commented that the hotel was convenient, but it could “be anywhere in the world and does not feel like being in Mexico.”

From the organizers’ point of view, these two hotels were the most convenient places to host the conference in terms of the availability of good conference facilities and technology. They were also preferable to hosting the event in the conference centre, as this would have created inconvenience due transportation expenses and associated costs. It was also mentioned that if the conference had been held in Mexico City, more locals would have been able to attend. But there was the security issue: Merida was safer.

### **Participants**

The conference was attended by 689 participants from 68 countries around the world and included researchers, policy makers, academics, and NGO and media representatives. There was a fair representation: 324 women and 365 men; 142 students and 547 professionals. The only group that was unable to attend the conference were the participants from Asia, due to disruptions at Bangkok airport, which made it difficult for them to reach the conference. There were also comments about the modest representation of the Canadian policy makers, whose presence were considered crucial for the support of the cause of the Forum.

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<sup>28</sup> Eco and spa hotels on the Caribbean coast and the so-called “boutique hotels” set up in old plantation houses in the countryside nowadays provide the most expensive and luxurious accommodation in the whole peninsula.

<sup>29</sup> The historic downtown of Merida consists of a colonial grid of small, crowded, and noisy streets. Many hotels in this area are cheaper than these two chain hotels, yet equally comfortable for conference attendants. However, the number of guests that each one could have accommodated might have been less than the total number expected.

<sup>30</sup> The reference to the windows has to do with something that happened at the Hyatt Regency, where the air conditioning system was so noisy that the guests decided to turn it off. But since the room then became too hot for many of them, they tried to open the windows, which they found were locked.

### ***Agenda, Method of Facilitation, Knowledge Management, and Communication and Educational Practices***

The knowledge (or conceptual) integration activities would have three specific forms: workshops, plenary sessions, and parallel sessions. The workshops were characterized by being quite specific in content, having a very practical topic at their core—such as the development of a given skill—and involving a task to be performed by the participants. These activities were not presented as part of the main conference, but rather as fringe events facilitated by different groups and organizations.

### ***The Opening Session***

The opening of the conference was attended by high profile representatives of the Mexican government, including the governor of Yucatan, in addition to a big panel that included 16 people. The opening lasted for more than two and half hours of consecutive speeches and presentations. This was not the most fortunate beginning with respect to the participants' reaction. Their frustration was reflected in their body language, yawning their way through the opening, checking their mobile phones, and sending messages on their BlackBerry devices. One of the participants commented: "We felt we had been hijacked and could not wait to get out." Although this opening was criticized by participants and some of the organizers, some saw the attendance of high-level government officials (which came with the attendant security and logistical problems) as a good gesture supportive of the conference and the concept of EcoHealth.

However, this inauspicious start was not typical of the conference. For example, the decentralisation conference in the presence of the Mexican First Lady and her attendance of the entire first day was considered to be a very significant positive gesture in support of the conference, raising interest in the issues discussed. However, the security was very tight, the dynamics were totally controlled by the Mexican government, and there was very little room left for discussion. Most of the people we met said that there was a cost or trade-off in inviting high-profile policy makers: while on one hand it was seen as a very important aspect of these large conferences, they also recognized that it came with several inconveniences that affected the flow of the conference and caused frustration for many, especially the researchers who lost their sense of ownership of the space.

### ***The Plenary and Parallel Sessions***

The plenary sessions were held mostly during the first session of each day. As noted by many participants, they took the form of massive lectures by specialists and highly renowned people in their respective fields of knowledge and/or practice. There were four plenary sessions during the conference, presented by approximately 14 experts in total. These lectures included a question and answer session at the end and were coordinated by a chairperson. In some cases, they also had a commentator who would try to summarize or make important remarks about the topics discussed.

There were two types of parallel sessions. The first type was the result of a response to the call for papers in relation to the different themes of the conference. The second type represented about 40 panels, which were organized by IDRC and aimed to bring together people from different regions that did not know each other. IDRC Identified a topic based on the issues they supported and approached a researcher (within or outside IDRC) to organize a multiregional panel. However, these proposed panels still had to go through the selection process with the scientific committee.

Generally, the latter type of session appeared to be more coherent and the former. Our observations and participants comments reflected that the latter type were mostly well organized and induced a good discussion. Although the audience was not aware of the different approaches to organizing the two types, they mostly favoured the IDRC-led type of panels. The problem with the first type of sessions was that the presenters in the same session could not always relate to each other, and not necessarily to the overall chosen titles of the sessions, which in many cases were irrelevant to the presented papers. Chairs, presenters, and participants were very frustrated when such a situation occurred, as it was not conducive to a meaningful discussion.

These parallel sessions were the main staple of the academic activities during the event. The more projected on to a screen. Of the sessions we observed, four corresponded to this typology.

There were, however, other instances where we observed exceptions. One example was a session consisting of the presentation of five case studies of successful interventions in the formation of public policies from Ecuador, Mongolia, Brazil, South Africa, and Mexico. This session was due to have the same restrictive format as the rest of them, but the participants (we were told) suggested to the chair the idea of improvising a different way of sharing their experiences. It was then decided that the whole group of people attending the session should be divided into five smaller groups and each presenter or presenters would talk about their experiences and answer questions from his or her immediate audience. At the same time, five questions were projected onto a screen that touched on common elements to be found or discussed in each experience presented in that session. Members of the smaller groups would rotate or move completely into another group after 10 to 15 minutes. At the end, all the presenters sat in front of the whole group and tried to answer the five main questions posed by the chair, or in this case, the facilitator, of the session. Another session included conventional academic researchers, but also a farmer, a community development expert, and even the project accountant.

In these two examples, the dynamic of interaction was most vibrant, compared with the other traditional ones; they were also highly appreciated and created a buzz around them. They were talked about by many we met who had not necessarily attended the sessions, but had heard how interesting they were and said that they wished that most of the sessions had been moderated in a similar way. The traditional format was the conventional, rigid academic paper presentation. In this format, typically one person would chair a given session of approximately two hours, on average. Between four and six people would then orally present their work, generally with the help of an electronic presentation

There were also two types of parallel poster sessions. There were those that ran along the same lines as the rest of the parallel sessions, as a different format of presentation, where presenters took a few minutes to talk about their work then moved on to a panel discussion. Then, there was another type where a space was made available for participants to put up their posters at lunchtime when people could visit them and have a discussion about them. Both types were appreciated different ways of initiating discussion around interesting topics. While some participants complained about the timing of the latter type—having it during the lunch break—others saw it as much better than at other conferences where poster spaces were provided very early in the mornings. There was an average of 40 to 50 of these sessions per day.

Generally, in spite of all these different formats, many participants wished to have more room for discussion and a different, less conventional set-up (including the physical setting). It was not only the participants who wished to see a different non-academic format, but also the organizers and IDRC staff, who made a deliberate effort by hiring a consultancy group—the International Institute for Facilitation and Change—to take a leading role in facilitating the conference, but mainly to try to conduct the sessions in a participatory non-conventional way. However, as was explained in the interviews, this group was brought into the process rather late, after the agenda had already been set and there was very little room to introduce significant changes to the format of the sessions. Moreover, they were not involved in the early stages of the logistical arrangements for the conference site, which was another limiting factor, as the physical setting was a major determinant of the method of facilitation and mode of discussion.

It was evident that many participants highly appreciated any occasion when a different, unconventional format was followed. For example, one of the events was a round-table session celebrating distinguished women in EcoHealth. Although it was not really a round table—as the panel of women was at the centre of the stage and the audience was lined up in the same way as in the plenary, and despite the problems with microphones—this session was well attended and the room was packed with participants who listened closely to the discussion and were interested in the question and answer arrangement of the interview-like format. In the cocktail reception that followed, people described the session as excellent and inspiring, and continued discussing the issues that had been raised. Organizers interviewed in relation to the other conferences they had participated in made similar observations with regard to the interest that these different formats created.

Another issue that several participants commented on was language. Although, there were multiple translations available for the plenaries, this service was not made available in the parallel sessions. This made it difficult for those who were not well versed enough in the languages of the sessions (which were either English or Spanish) to confidently present their papers or have a deep discussion with the rest the participants.

### ***Attendance***

Despite the varying complaints made by the participants about the packed agenda and the format of the sessions, most parallel and plenary sessions were well-attended. It was noticeable, though, that the level of attendance decreased in the second half of the day while, in general, with the parallel sessions it decreased in a much more noticeable way toward the end of the conference. However, overall, participants impressed themselves and the organizers by keeping up with what they described as a tiring agenda. One of the organizers said: “It is a sign of assurance to see most people staying throughout the whole conference and resisting the tourist attractions in Merida. It was even more impressive to see the high turn up level for the after-conference global meeting of the communities of practice who were committed to stay and participate.”

The majority of the participants did not usually stay for a whole session, which meant that they missed the discussion, since most sessions ran the presentations consecutively and provided 10 minutes at the very end for discussion. Leaving sessions before they ended was not at all due to a lack of interest in the topics, but because participants were desperately trying to catch up with different presentations of great interest that were running simultaneously in different sessions, an issue that caused a lot of frustration and exhaustion for many of the participants. As one of them said, commenting on the packed agenda at the very end, “This was like butter thinly spread.”

The organizers' of the EcoHealth and two other conferences said that they too were not happy from the beginning with the enormous number of presentations and panel sessions they had to schedule. However, they were put under considerable pressure to provide space for the different partners, who did not want to attend just as members of the audience but wanted to present their work to the conference. It was even mentioned that some participants had declined when they realized that they would be participating in a poster session and not giving a formal presentation.

### ***Formal and Informal Spaces of Networking and Organization-Building***

As a major component of the impetus for the EcoHealth approach, IDRC has encouraged the formation of different communities of practice in EcoHealth, or CoPEHs. These have become well-established networks of practitioners and academics involved in projects that use or deploy an EcoHealth approach. To date, there are four regional networks defined by language and historic links. Thus, we have the Arab-speaking network in the Middle East and North Africa (CoPEH-MENA); the Spanish- and Portuguese-speaking network in Latin America and the Caribbean (CoPEH-TLAC); the French-speaking network in Western and Central Africa (CoPEH-SSA or COPES-AOC); and the English-speaking network in Canada (CoPEH-CAN). Another group formed their own CoPEH of the South and South East Asia region. All these different CoPEHs were present at the event and had a dedicated space to gather and exchange experiences. Networking formation opportunities occurred all the time, but from the point of view of structured spaces, they could be identified as the "partnering paradise" space, the poster presentation, and some of the events organized for and by the CoPEHs. The reason why we consider the poster session to be a network formation activity is that, according to our observation, people used it as an opportunity to make their names and work known to other people in a less academic way. There were, of course, a lot of data and illustrations in all these posters, but the most important thing was the face-to-face contact and the opportunity to interact in a less formal space than during the parallel sessions. Poster presenters would also take this opportunity to hand out their own brochures, leaflets, and business cards. At the end of these conversations, more contacts would have been made that were not intentionally planned, and that came about through serendipity or luck. Poster presentations were also an opportunity for less prominent researchers to make themselves known in the context of such a massive event. This was the case with a number of students I met, whose only academic participation in the conference was the presentation of their posters. In addition to the central purpose of showcasing results, the publications booths were also spaces for networking.

The two meetings formally organized for the CoPEHs were the first cocktail reception before the beginning of the conference and the last global meeting after the last day. The first cocktail reception was attended by almost all the CoPEH members, as well as outsiders. A participatory exercise was carried out, inviting participants to suggest topics of interest and identify a day when they would like to discuss them. A space named "partnership paradise" was made available every day at lunchtime, where participants could meet and discuss any issues of interest. Although this was an open space, not many people—including those who had committed themselves by suggesting topics for discussion—participated in it. The two main reasons for this were the timing and the location, which was tucked away in one of the hotels and was not well advertised. However, some people used this space for different purposes, such as organizing private meetings or preparing for panel discussions.

Organization-building activities were also an important part of these events, particularly for actors like the IAEH and CoPEH-TLAC. In the case of the former, this conference marked the beginning of their association in earnest, both in terms of the formal constitution and ratification of its executive board and with the integration of its student chapter. These organization-building

activities were two specific events that were open and were expected to attract a large number of people. However, there was an poorly-attended discussion of the decisions being made by members of the board. This also showed in the scarce number of hands that were raised when motions were voted on—between 10 and 15. This did not stop people commenting at the end of the meeting that it had been the single most important moment of the whole conference. However, the consolidation of the association was something that concerned only a few participants and did not involve many members of the other recognizable communities, like the CoPEHs.

On the other hand, these other communities had their own spaces and occasions, even after the end of the conference. This was the case with CoPEH—TLAC, which after the main event moved into a smaller hotel in the historic downtown of Merida for a two-day working meeting. Here, the dynamics were completely different from the conference and involved group presentations, but mostly discussions about the next stage of the relationship between this network and IDRC. The main difference between this space and the network formation spaces was explained to me by a Brazilian researcher in the following terms. “The contrast between the networks built in the conference and the ones built here were that the former were “anonymous” networks [based on a topic] the contact is made with a person that you don’t know who the hell they are . . . . Here, on the other hand, . . . you have a double movement, a double [mutual] interest,” by which he meant that people knew each other and saw their interests reflected in the interests of the other person.

After the last day of the conference, a global meeting was organized for all the CoPEHs. The meeting was facilitated in a participatory way that allowed those who had not met each other before to interact and come together around issues of common interest. The meeting was well attended, despite the fact that it was held after the conference. There were several positive remarks made by CoPEH members about it, but many wished that such a focused meeting had been held early on in the conference so that people could have continued the discussion, as even this would have made them more interested in joining the “partnership paradise” activities.

In addition to the structured spaces organized for or by the members of these communities, participants informally connected with each other in different ways, organizing meetings for academic discussion or informal outings. For example, two of the participants mentioned that they had met four years ago in a coffee shop during the Montreal Forum in 2003 and ended up collaborating on a paper that they co-published and they were discussing another collaboration during this conference. Many others outside the CoPEH groups had a sense of community and related to each other.

Due to all the above activities, community members were highly appreciative of the opportunity this conference gave them by providing the facilities, spaces, and chances to meet.

### ***The Process of Synthesis and the Closing Session***

In order to synthesize the conference deliberations, the organizers facilitated a process whereby four teams were assigned the task of assimilating and filtering key messages. Each team was headed

by a chairperson and had a group of advisors who volunteered to help in the process. The main idea was to record information and views around the four themes identified by IDRC in relation to following five questions:

- What has been inspirational?
- What will continue to challenge us?
- What are the exemplars of good practice?

- What has been missing?
- Is there a sense of urgency?

The four groups met at 7 in the morning to discuss and consolidate these views. On the last day, the four chairpersons, in collaboration with their advisors, prepared presentations for the closing session. Although this process did not really include all the participants, the way the last closing session was designed and facilitated gave them all the chance to listen to these presentations and comment on them. After the four presentations, all the participants were asked to break into groups of four, discuss these issues for 15 minutes and then come back with questions to the panel. Although some of the organizers had doubts that this might work with such a big group, it worked out really well and was equally appreciated by both the organizers and the participants, who stayed engaged till the very last moments of the closing session.

Based on these presentations and discussions, the chairpersons collaborated in drafting a call for action. As explained by the organizers, the call for action draft was to be seen as an ongoing work in progress, which would be shared with the steering committee and then sent out for all participants of the conference to comment on.

A similar process was adopted in the decentralization conference, which led to the drafting of policy recommendations. In both cases, the participants were highly appreciative of seeing an outcome to these large gatherings, even though the EcoHealth p was not seen as conclusive.

### ***The Site Visit***

The site visit to Celestun, in one the beautiful protected areas of Merida, managed to attract a significant number of people, as opposed to the other trip to San Felipe. In the case of Celestun, there were more than 30 people on the bus that took us from Merida to this fishing village on the western coast of Yucatan.

The academic component, or knowledge (or conceptual) integration activity, consisted of a highly technical talk given in barely comprehensible, broken English by a member of a local research centre who had been involved in conservation projects for a long time and had spent his entire professional career working there. He described Celestun as the “most beautiful place in the world.” His presentation was filled with scientific information, graphics, maps, and tables. He also showed photographs that stressed the natural beauty of the place, something that attracted cries of “Oh” from his captive audience. The core of his explanation of the site was how the ecosystem is supposed to work and how humans can contribute to this. We then had an uneventful and quick trip to the village, saw flamingos and other bird species, swam in a natural pond in the mangrove system, went for seafood by the beach on a cool afternoon, and returned to Merida in time for some people to take their taxis to the airport and back home.

In spite of the rushed and highly-priced little guided tour, few people openly complained about the amount of money they had paid and the little time allowed to enjoy the natural beauties of the place. Most of the site visitors were middle-aged and some even very elderly, with few young people. It was obvious that many had a keen interest in nature and bird watching (many of them had their bird guides and binoculars) and this was one of the main reasons they had decided to come. That and the fact that they could afford the price of the tour that was more expensive compared with other services available from the hotel. In fact, we bumped into people who had decided to hire the services of a different travel agency and go to the same village. An attendant from the U.S. in his early 60s pointed out: “For us—that enjoy being outdoors—[the trip] wasn't enough. We would've liked it to be more time. But the place was

great! Now I'm actually worried about London<sup>31</sup>[...] because of the money. Because it's going to cost at least double what it cost here.”

### ***Post-Conference Phase***

IDRC's work does not stop at the end of the conference but, as stated by one of the program leaders: "The work required after the conference is as important and as demanding the effort invested before and during the conference." Reflecting on the entire experience and follow-up activities are two main areas that the Centre invests in and focuses on in the post-conference phase.

### ***After Action Review (AAR) Sessions:***

This is a reflective exercise that staff members conduct systematically after most major events. The main aim of this session is to reflect on the whole experience; acknowledge the efforts invested; look at what worked and what didn't work; and think about the lessons learnt and how things could be improved in the future. As stated in one of the reviewed documents: "AARs are a simple team-working processes to learn immediately, and in the midst of action, from both successes and failures. The focus is on learning rather than critiquing, and the key is openness and participation by everyone who was/is part of the action."

### ***Follow-Up Activities/Strategy***

As stated by one of the team members of IDRC, "Efforts invested in the conference and all realized gains could be easily forgotten if we do not have a well thought out follow-up strategy." IDRC members are well aware of the importance of follow-up in consolidating their outputs and strengthening the ties and bridges they have created through the conference.

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<sup>31</sup> London is the venue for the next Forum.

## Annex 7: A Note on Social Network Analysis

Social Network Analysis is a methodology for mapping networks and has been used to assess the impact of conferences in building relationships and strengthening communities of practice.

### Strengths for Conference Evaluation

The empirical description of networks provides for a view of:

- asymmetric relationships
- aggregations (cliques)
- structural holes in networks
- possible broker positions

The graphic visualisation fundamental to this methodology offers the opportunity for collaborative analysis and transparency, making it a good communication process for coalition and consensus building. Indeed, as the software becomes ever more sophisticated, the potential to represent increasing dimensions of networks visually means that more complex information can be shared and considered.

### Concerns for Conference Evaluation

The focus of social network analysis in the context of conferences is on –complete networks,<sup>32</sup> which essentially treat all actors as equal, therefore missing an important component of the power analysis crucial to the influencing and capacity building agenda of IDRC. Some researchers<sup>33</sup> of social network analysis suggest integrating ethnographic methods to allow you to look at the network from inside and generate emic (or self-defined) categorisations, but evaluators are still left to reconcile homogeneity of categories across different communities within a network. The visualisation of a network representing all its complex dimensions can be overwhelming, reducing its value as a communication tool.

In addition to the unreliability of cognitive data, we need to consider the particular vulnerability of this data when it comes to issues like influence, power, and knowledge. Respondents may be wary of revealing sources, their personal opinion leaders, or those to whom they have special access. Without complete data, SNA becomes a meaningless, even misleading, exercise.

How do you measure information flows and influence? These fundamental dynamics are not accounted for convincingly in SNA. This has implications for how SNA can represent the character of relationships. By extension, it suggests that as a tool, SNA is only indicative of one of the general objectives associated with conferences in IDRC network building.

There is an unresolved theoretical tension underpinning SNA, about the extent to which the social network impinges on individual agency. The assumption in the methodology is that we are all embedded and rational in a network of relationships, so it might be argued that SNA maintains a particular and inadequate notion of logical planning. If IDRC was going to build a monitoring and evaluation framework around SNA, it would be important to invest in a research strategy that would advance this theoretical debate so that the Centre could increase its confidence and capacity with the methodology.

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<sup>32</sup> As opposed to –egocentric networks,” which are from the point of view of the individual’s world.

<sup>33</sup> Holger Illi (see Annex 3).