

# Guidelines

## WRITESHOPS

A Tool for Packaging and Sharing Field-based Experiences



# A Guide to Organizing Writeshops

## Writeshops: A Tool for Packaging and Sharing Field Experiences

Julian F. Gonsalves  
Ric Armonia



IIRR 平



Published in the Philippines in 2010 by the International Institute of Rural Reconstruction, International Potato Center - Users' Perspective with Agricultural Research and Development, with funding from the International Development Research Centre.

**ISBN: 1-930261-27-6**

© International Institute of Rural Reconstruction and International Potato Center - Users' Perspective with Agricultural Research and Development

The publishers and authors of the individual papers encourage readers to quote, reproduce, disseminate and translate materials from this sourcebook for their own use. Due acknowledgement, with full reference to the article's authors and the sourcebook publishers, is requested.

**Correct citation:**

Gonsalves, J.; R. Armonia (eds). 2010. Writeshops: A Tool for Packaging and Sharing Field-based Experiences (A Guide to Organizing Workshops). International Institute of Rural Reconstruction, International Potato Center - Users' Perspective with Agricultural Research and Development. Manila, Philippines.

*For further information, please contact:*

**International Institute of Rural Reconstruction**

Y.C. James Yen Center  
Silang, Cavite 4118  
Philippines  
information@iirr.org  
www.iirr.org

**International Potato Center-Users' Perspectives With Agricultural Research and Development (CIP-UPWARD)**

Elvira Tan Hall, PCARRD Complex  
Los Baños, Laguna, Philippines  
cip-manila@cgiar.org  
www.cip-upward.org

**International Development Research Centre**

Regional Office for South Asia and China  
208 Jor Bagh, New Delhi 110003, India  
www.idrc.ca / www.crdi.ca

**Cover design and layout: Celso C. Amutan**

# Preface

Ever so often one stumbles upon innovations in human development somewhat hidden from those who could benefit from them, resulting in the proverbial "reinventing-the-wheel". While many times information relating to these exists only in the heads of development practitioners who were part of generating it. In others, it lies inscrutable in documents such as scientific research journals. Writeshops, a participatory way of packaging knowledge over a short period of time, have helped document tacit "experiential" knowledge. They have also been useful in enhancing the relevance of explicit "expert" knowledge, by making it understandable and thus, more easily usable.

In trying to improve documentation of project experiences, IFAD projects and partners in Asia-Pacific discovered writeshops and how these could complement and supplement their efforts. Over the period 2003 to 2010, starting with simpler writing skills sessions, several project and country teams organised writeshops to document project experiences, learning from and adapting the process to their needs and context. All these happened in almost complete isolation of other writeshop experiences accumulating across the globe since the year 1987, when the first writeshop was organized by the International Institute of Rural Reconstruction (IIRR). What is notable is that IFAD had produced a document *Enhancing Ownership and Sustainability: A resource Book on Participation* with IIRR and the Asian NGO Coalition (ANGOC) using a writeshop approach as early as 2001. However, the wider use of and experimentation with the methodology at the hands of IFAD project and country team members began later, in the year 2003.

With several experiences building-up within the IFAD family, the opportunity was ripe to analyze its learning, validate it with other users and create tools for future users both within and outside of IFAD: in essence, a review of the writeshop methodology and its relevance to development practice.

To do this, IIRR and Knowledge Networking for Rural Development in Asia-Pacific Region or ENRAP — a joint initiative of IFAD and IDRC supporting knowledge-networking among IFAD projects and partners since late 1990's — joined hands. Papers on experiences of users were invited and authors along with key experts met over a three-day period at IIRR, the Philippines, in early July 2010 to share learning and good practice. Specific recommendations were also made for guidelines in organizing and conducting writeshops.

A series of three publications — *Workshop Proceedings*, *Case Studies*, and *A Guide to Organizing Writeshops* — resulted from the deliberations of the Writeshop Methodology Review exercise. These are available as printed copies and in a CD. The latter has extra materials produced at the workshop. All these are also available on the ENRAP website [www.enrap.org](http://www.enrap.org).

This **Guidelines** document is aimed at those planning to conduct writeshops. The review informs the writeshop guidelines. It starts with a short history of the methodology going on to explain what it is and how to go about it with examples of producing case studies, policy briefs, source books and training materials through writeshops. It also includes some useful tips for writeshop organizers. This is part of the twin-pack to go with the Cases document.

I hope that this effort will help make available "hidden" field knowledge and thus, make voices from the field become part of global dialogues on development more effectively. I also hope that this will help knowledge translation, making expert knowledge more accessible and usable for development practitioners.

## **Shalini Kala**

ENRAP Coordinator

International Development Research Centre Regional Office for South Asia and China

# Acknowledgement

**T**he richness of this series of publications has been possible mainly because of the generous sharing of experiences of workshop participants who travelled from different countries to get together for three days in July 2010 at IIRR, Silang Campus, in the Philippines. They are Maksat Abdykaparo, Jose Roi Avena, Isaac Bekalo, Joy Caminade, Dindo Campilan, Li Chanjuan, Hidelisa de Chavez, Marise Espineli, Keam Han, Bernadette Joven, Jennifer Liguton, Denise Melvin, Paul Mundy, Khanhkham Ouneoudom, Sudhirendra Sharma, Pech Sithan, Juan Su, and Yinhong Sun.

As part of the steering committee, Marise Espineli, Shalini Kala, Priyanka Mohan, Paul Mundy and Emily Monville Oro played a key role in shaping the design and implementation strategies for the workshop.

Many thanks to the IIRR team who were involved in workshop organization as well as production of the workshop outputs. Dulce Dominguez and Lilibeth Sulit-Villela of IIRR, Sucheta Rawat and Reema Singh of IDRC, and Jhennelyn Dogelio formed the backbone of the effort by providing excellent support to administration, logistics and communications. Their engagement at the workshop and from behind the scene contributed to the smooth operations of the workshop and post-workshop activities.

Paul Mundy, Shalini Kala, Priyanka Mohan and Celso Amutan provided extremely useful and detailed feedback and constructive suggestions at different stages of this effort. Celso Amutan painstakingly worked on the design, editing and layout of the many versions of workshop outputs. Thanks are also due to Chase Palmeri of IFAD; without her support and encouragement this would not have been possible.

Finally the editors would like to thank the donors who supported this review — the International Development Research Centre Office for South Asia and China, International Fund for Agricultural Development and the Canadian International Development Agency.

**Julian Gonsalves and Ricardo Armonia**

Editors

30 September 2010

Philippines

# Introduction

**W**riteshops were originally used by IIRR and some its early partners, mainly to address the issue of poor engagement of field workers in the process of documentation, learning and sharing of knowledge. Successful field projects whose impacts remained localized were another issue to be addressed. Ways had to be found to increase their influences in the wider community. The challenges posed by the limited uptake of exemplary practices, and the reality that useful knowledge often remained in the mind of workers or in reports and unpublished documents, prompted the discovery and testing of writeshop approaches.

At the outset, writeshops were an intensively participatory approach, involving a diverse range of stakeholders and players. Field workers had little time to sit down, reflect on and write their experiences: they were simply too busy doing what is really more important i.e., staying engaged and connected with local communities, where the real action was. Field workers were brought together for a brief time, usually in a workshop setting, during which they reflected and were provided support to synthesize, draw lessons and write their experiences. Working with their peers had a strong motivating effect. Sometimes academics and researchers helped these field workers to better understand the value of their knowledge and contributions. Editors and artists were around to assist in the process. Witnessing how their rough outlines and drafts underwent transformation, and finally seeing their names as "authors" on the last day served as rewards. Their outputs were displayed on the last day and their supervisors were invited to view the near-final products. Field workers returned to work with an increased interest to write and share. Supervisors reported that participants wrote better reports and understood why case studies were important.

At another level, researchers also began to be challenged by issues of knowledge management. These challenges came from civil society and donors wanting to see a more direct impact of investment. The issue of unused knowledge was simply not one of extension workers performing, it was much more complex. It was often a matter of the limited relevance of their knowledge products and direct usability. Here, writeshops were used to transform research outputs. Increasingly, this was

referred to as a "repackaging" effort involving the use of editors and artists. Original authors were not necessarily involved in the process. Secondary material was identified through scoping studies and then shortlisted for repackaging by production teams. Researchers valued such efforts by others to promote wider application of research outputs and scientific conference proceedings. Writeshops began to be used to help the research community as well.

The adaptation of writeshops continued and now are being used for a range of other purposes: developing project proposals, evaluation frameworks, case studies, case stories, curricula, policy briefs, etc. Writeshops lend themselves to adaptation provided certain key principles were followed e.g., multi-stakeholder and peer participation, frequent review and revision, increased use of transformation approaches (not just the classic editing approaches) in writing, need for flexibility and openness to revising topics and papers, increased use of graphics, artwork, and design to enhance presentation, etc.

The Writeshop Review workshop organized in the Philippines in July 2010 resulted in this series of three publications and is a modest effort to share what was learnt through the review. The first publication is a *Workshop Proceedings* written to highlight experiences, lessons and principles for learning purposes. To that extent, its not just a workshop report but a proceedings which documents the writeshop processes. The second publication — *Case studies* — is a collection of experiences in using the methodology. The cases are intentionally not presented as abstracts as is often done. They are presented in abridged forms to ensure that the reader benefits from the details in the experiences shared. This is for future users interested in using writeshops and wanting to know what lessons can be learnt from previous experiences. The third publication is a *Guide to Organizing Writeshops*. It provides a short summary of the writeshop process, related pointers and recommendations. It also has short product-specific guidelines, focusing on the four major products emphasized at the workshop. In addition, a CD is available with the entire collection of workshop outputs.



The editors are very conscious that these outputs do not completely reflect the breadth and range of experiences. Writeshops are too powerful a mechanism for us to be rigid about them. They must evolve and they must be tailored to each organization's needs. The best one can offer is experiences and insights for others to test, develop and adapt. To that extent it is hoped that the readers will consider this as a work in progress and will develop these ideas further. The potential for writeshops has yet to be fully maximized and readers are encouraged to explore this interesting tool in their own work.

**Julian Gonsalves and Ricardo Armonia**

Editors

30 September 2010

Philippines

# Table of Contents

Preface .....	<i>iii</i>
Acknowledgement .....	<i>v</i>
Introduction .....	<i>vi</i>
A Guide to Organizing Workshops.....	3
Purpose of the Guide and for Whom.....	4
About Writeshops.....	5
Designing Writeshops .....	9
Organizing Writeshops .....	14
Adaptations to the Writeshop Process .....	18
Writeshop Guidelines .....	26
Considerations for Using Writeshops in the IFAD Context .....	39
Appendices	
A. Sample Templates and Checklist for the Management of Writeshops .....	48
B. Information Resources .....	61

# A Guide to Organizing Writeshops

This *Guide to Writeshops* is based on the case presentations, discussion outputs and materials shared during the Writeshop Methodology Review Workshop held 07-09 July 2010 at the Y.C. James Yen Center in Silang, Cavite, Philippines. The Review Workshop was undertaken to study global experiences in using writeshop methodology to share experiences and to document processes used and lessons learnt from practitioners and experts in this field.

The workshop was organized by the International Institute of Rural Reconstruction (IIRR) in partnership with the International Potato Center-Users' Perspective with Agricultural Research and Development (CIP-UPWARD) with support from the International Development Research Center (IDRC) and the International Fund for Agricultural Development (IFAD). It gathered 24 writeshop users and advocates from Cambodia, China, India, Lao PDR, UK, Philippines, and The Kyrgyz Republic; and from international development agencies — the Food and Agriculture Organization (FAO) and the institutions that organized the Review Workshop.

The results of the review were captured in a documentation that comes in three parts: the *Workshop Highlights*, the *Case Studies* and this *Guide to Organizing Writeshops*. All materials will be made available at the following websites: <[www.iirr.org](http://www.iirr.org)>, <[www.cip-upward.org](http://www.cip-upward.org)> and <[www.enrap.org/resources/activities/enrap-iii/enrap-experience-on-writeshops](http://www.enrap.org/resources/activities/enrap-iii/enrap-experience-on-writeshops)>.

# Purpose of the Guide and for Whom

This Guide introduces WRITESHOPS as one of the tools available to development practitioners and organizations for capturing and packaging field experiences for wider use.

As a general reference, three questions are used here in deciding on the use of the writeshop methodology and to determine the parameters that will guide its design and organization.

- What experiences and materials do we have now?
- Why should these experiences and materials be packaged and for whom?
- What is needed to make this happen?

This guidebook mainly deals with the last question. It is intended to be a practical guide for facilitation of writeshops.

In the last six years several experiences had accumulated amongst IFAD's poverty alleviation projects in using writeshop to document project experiences. In July 2010 these were shared with a diverse group of writeshop users and promoters. The methodology was reviewed and validated through various experiences and resulted in three documents namely, *A Guide to Organizing Writeshops*, *Case Studies* from around the globe describing the use of writeshops, and the review *Workshop Proceedings*.

The *Guide*, used along with the *Cases*, can be a useful tool for those exploring the relevance of the writeshop methodology, and in determining which situations it works best.

# About Writeshops<sup>1</sup>

## What are writeshops?

A writeshop is an intense process aimed at bringing together several actors involved in knowledge generation and packaging — authors, editors, artists, and desktop publishing specialists — to produce a publication, for example to document best practices in development, or to prepare a policy brief, in a relatively short time. It is a very flexible way of producing various types of information or knowledge products, from bound books to leaflets, and from training materials to source books.<sup>2</sup>

## Standard features

A typical writeshop requires a relatively long lead-time for planning and for the arrangement of support services and logistics. It typically involves 20-50 participants from different organizations who stay throughout the writeshop period. A team of 2 facilitators, 2-4 editors, 2 artists, plus photocopying and logistics support staff (at a minimum) is needed to plan and run the writeshop. It may last from 5 to 10 days, and is usually held in a hotel or conference center away from office/work settings and shopping centers. All these could make writeshops a relatively expensive

---

<sup>1</sup> This section contains several excerpts, tables and illustrations adapted from Mundy, Paul. (7-9 July 2010). *Adapting the Writeshop Process*. Powerpoint lecture presented in "Writeshop Methodology Review". IIRR, Silang, Cavite, Philippines. [http://www.mamud.com/presentations/108\\_adapting\\_writeshop\\_process.ppt](http://www.mamud.com/presentations/108_adapting_writeshop_process.ppt).

<sup>2</sup> A sourcebook is a collection of single topic practical information sheets which can be used independently of each other. Sourcebooks are not summations. They include sections or categories of similar articles. The categories can be pre-determined (i.e., structured) or they can evolve from a collection of articles (i.e., determined later). Usually, a sourcebook is bound (not loose leaf) and is richly illustrated and attractively laid-out by graphic designers. Free use of materials is permitted for educational purposes (Julian Gonsalves).

Before Writeshop	During Writeshop	After Writeshop
<ul style="list-style-type: none"> <li>• Identify audience and objectives</li> <li>• Identify type of materials needed</li> <li>• Identify theme of book, break it into separate "topics"</li> <li>• Prepare guidelines for authors, invite authors to write drafts</li> </ul>	<ul style="list-style-type: none"> <li>• Introduce writeshop procedure</li> <li>• Each author presents draft</li> <li>• Audience comments</li> <li>• Editor and author revise manuscript</li> <li>• Artist draws illustrations</li> <li>• Author presents draft 2</li> <li>• Small groups develop ideas</li> </ul>	<ul style="list-style-type: none"> <li>• Editor revises manuscripts and checks final queries</li> <li>• Final draft laid out, proofread, printed and distributed</li> </ul>

undertaking. A standard writeshop goes through these 3 stages - *Before* writeshop, *During* and *After*. Others refer to this as the preparation, workshop and post-workshop stages (Figure 1).

## Process, Participation, Product: 3 Ps

### PROCESS, the first P

At the core of any writeshop are three processes that enhance the quality, content and presentation of the final product. These are (a) presentations and comments that facilitate information exchange; (b) editing and rewriting that result to information-transformation; and (c) small group discussions that generate additional information or ideas for new articles.

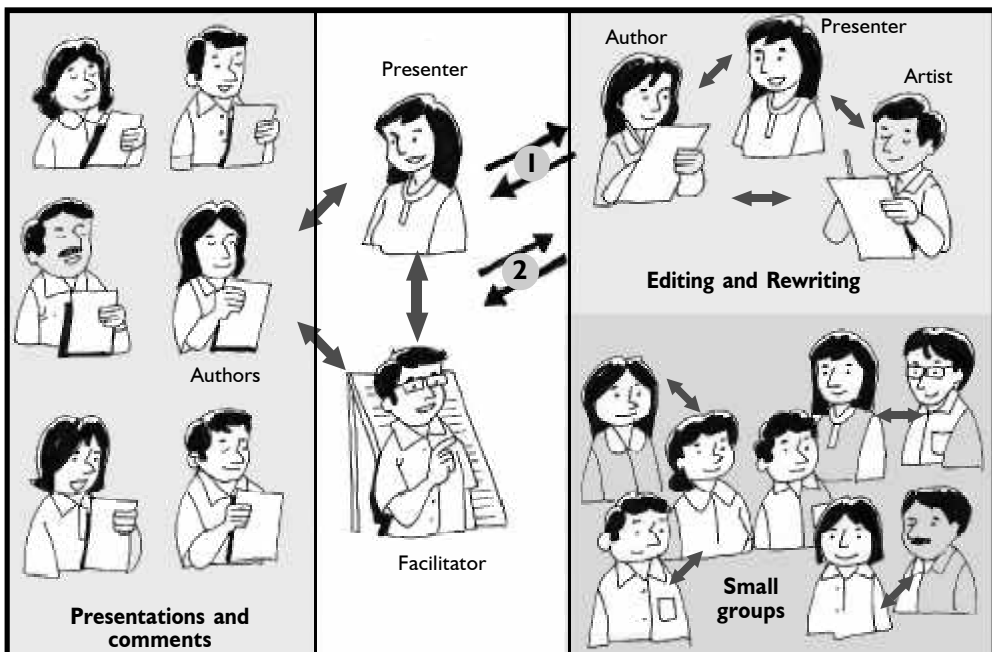
#### Benefits of Participatory Processes in Writeshops

- Peer review by a heterogeneous group of users (academics, researchers, field workers) helps in the pretesting of such materials and also improves quality and relevance (content, layout, presentation).
- Multiple stakeholders bring a diversity of perspectives and approaches. Different vantage points for looking at the same issue are provided to readers.
- Being involved in a process that involves healthy debate and critiquing invariably builds mutual respect between people of different perspectives.

**Presentations and comments.** Participants present their drafts to other participants, peers, subject matter specialists, and members of the target audience for comments on the draft. Through this process, information is validated, expanded or further substantiated (e.g., with data or case stories).

**Editing and rewriting.** Participants discuss their drafts with an editor for help in rewriting and adapting the articles. This enables a critical and detailed look at the structure, content and style of the draft. The editor helps the author convert the draft from scientific jargon or "farmer talk" into text aimed at a wider (defined) audience. An artist may help turn messages into illustrations or graphics.

## The three main processes of a writeshop



**Small group sessions.** Writeshops frequently include sessions where small groups draw on their own knowledge and experience, as well as the drafts to brainstorm on new ideas and implications. These ideas may become part of an analysis or synthesis section of the resulting book, or the recommendations section.

### **PARTICIPATION, the second P.**

This is a key feature of writeshops no matter what stakeholder groups are involved. The process of determining the scope of the publication and its format and agreements on themes and topics is always highly a participatory activity. A discussion draft list of topics is arrived at by a steering committee (composed of internal and external stakeholders) and this is subsequently revised during the first day of the workshop (gap analysis activity), in consultation with participants. Donors and representatives of users are invited to contribute ideas at different stages. Organizations that might not otherwise work jointly in field projects are brought together at writeshops.

- Case-based texts are books containing selected cases to illustrate a particular topic, placed within a theoretical framework and analysis.
- Policy briefs are short, 2- or 4-page leaflets aimed at policymakers.
- Sourcebooks are bound equivalents of the loose-leaf kits: a set of short, illustrated items describing experiences, approaches or techniques, grouped together into several sections on particular topics.
- Training materials consists of curriculum outline, manual for trainers and learners, exercises and resources.
- Textbooks are aimed at schoolchildren and students, and contain readings, instructions and exercises.

## **PRODUCTS, the third P.**

Writeshop products may be generally categorized according to the main source used to develop the articles - direct field experience (primary source), or secondary materials or sources. A large number of sourcebooks have been produced based on direct field experiences of projects and organizations. Writeshops have also been used to simplify science right from the beginning. ICRAF<sup>3</sup> has used writeshops for scientist to write easily understandable scientific papers. Writeshops are also used to repackage scientific literature and research report with the help of editorial teams. Three other most important and/or frequently produced products of writeshops are case-based texts, policy briefs, and textbooks and training materials. Each of these four popular writeshop products caters to different target audiences and therefore presentation of the information has to follow different guidelines for it to be effective.

Other knowledge products produced through writeshops are information kits, how-to manuals, posters and flipcharts, project design documents, project evaluation documents, video and audio scripts, and websites. Writeshops feature consultative processes, pre-testing via frequent revisions and increased emphasis on graphics and hence have wide applications.

---

<sup>3</sup> *Personal communication with Richard Coe.*



# Designing Writeshops

**F**our key elements of writeshops are: (a) the draft manuscripts and/or the primary and secondary materials on which the manuscripts are to be based; (b) the objective/s and the target audience; (c) the members of the writeshop team which include the authors and peer reviewers, editors, artists, resource persons, facilitators, administrative and production/publications staff; and (d) the facilities and logistics.

A steering committee may be formed to assist the organizers in the design and implementation of the writeshop. This should include members of the projects or organizations involved. The steering committee provides guidance to all processes involved in the writeshop whether related to people, content, format, logistics and distribution.

## **Draft Manuscripts: What experiences and materials do we have now?**

### **Are there enough experiences, lessons and mature technologies or processes ready for inclusion in the materials development effort?**

The best sources of writeshop materials are the direct field experiences generated by projects and partner communities. Field notes, project monitoring and evaluation reports, process documentation reports, and notes of community or project meetings are good starting materials for preparing writeshop draft manuscripts. Review and evaluation reports are also especially valuable because “outsiders” can often highlight unique features or exemplary ideas or processes worth sharing widely. Development practitioners can benefit much from these field-generated lessons and mature technologies and processes if these are presented in appropriate formats, instead of the usual progress and technical reports.

For relatively simple technologies and processes especially those that are already being practiced by communities or which have been evolved and tested through time, draft manuscripts may be easily developed by or with the owners, users or promoters of these. Farmer-level writeshops may be considered to document indigenous knowledge or local innovations. Case stories are especially useful here. Early examples of such technologies and processes can be seen in the *Regenerative Agriculture Technologies Kit* or in the *Agroforestry Technology Information Kits* produced by IIRR through its first writeshops way back in 1987 and 1989 respectively.

### **When is a writeshop approach to producing information materials relevant?**

- When there is a need to pull together diverse experiences (and proponents) working on specific thematic areas (to avoid competition, confusion, duplication, etc.)
- When impact must be demonstrated
- When a project wants to share its lessons and findings more widely
- When a pilot project or other small-scale experiment or activity merits wider expansion and use
- When a program is to be scaled-up by widening the "user" base (e.g., NGO mainstreaming its work at the government level)

SOURCE: J.F. Gonsalves and Joy Rivaca-Caminade. A Participatory Workshop Process to Produce User-Friendly Information Materials in IFAD, ANGOC and IIRR. 2001. *Enhancing Ownership and Sustainability: A Resource Book on Participation*, p 154.

Sometimes field-based lessons can only be generated by going through a series of steps or phases to ensure prior processing of the experience and systematic field data collection. In such a case, the writeshop materials production has to be preceded by other methodologies like "systematization."<sup>4</sup> IFAD for example, has found it effective if writeshops are used *along* with such tools because it helps ensure that enough and well-analyzed materials are available at the writeshop.

### **Are there secondary materials available for translation into easily usable and readily accessible formats?**

In the course of project networking activities and by browsing through the internet alone, one discovers a vast wealth of already published or documented materials waiting to be shared and utilized at the field level. Most of them, however, are not in readily usable and easy to understand formats and writeshops to develop sourcebooks is a suggested solution to this problem.

---

<sup>4</sup> Systematization is a methodology which facilitates the on-going description, analysis and documentation of the processes and results of a development project in a participatory way. Some of the tools used for systematization include problem tree, SWOT, planning matrix, advantages and disadvantages table, pros and cons chart, and logical framework.

SOURCE: Daniel Selener. *Systematization: Documentation and Sharing of Project Experiences and Lessons in IFAD, ANGOC and IIRR*. 2001. *Enhancing Ownership and Sustainability: A Resource Book on Participation*, pp 211- 216.

## **Objectives and Audience: Why should these experiences be packaged and for whom?**

Writeshops can draw on many different projects or organizations. When it is concluded that there is enough experience and materials (including relevant and accessible secondary materials) that are ready for repackaging into more usable formats through writeshops, the next important thing to determine is why they need to be repackaged and who will read them. Being clear on these will dictate the kind of writeshop products that need to be developed and how the writeshop should be designed and managed.

### **General context for doing writeshops**

Two reasons normally associated for doing writeshops are:

- For project or organizational learning to improve performance, results and impact
- For wider sharing or mainstreaming of experiences and knowledge and in networking and cooperation among the different development stakeholder groups beyond the local or project setting

### **Objective, audience and associated writeshop products**

If the primary or immediate objective for generating knowledge products is project or organizational learning, then the audience is likely to be management and staff. For much larger organizations like IDRC and IFAD that operate on a regional or global scale, the audience may include the country partners. Normally, the associated writeshop products here would be case-based texts for fellow workers or policy briefs for government partners.

If the objective of the project or organizations is to combine both internal learning and sharing agenda, then the audience can be expanded to other organizations and institutions. Then, other considerations could apply:

- If sharing is with other NGOs or organizations implementing similar projects or having similar interests and perspectives, the associated writeshop products will be the case-based texts, posters or flipcharts.
- If sharing is with the policy making bodies, government units and agencies, and the general public, then the writeshops should be on producing policy briefs. This may include translation or repackaging of available research results into

policy briefs and injecting in them field-based evidence generated by projects.

- If the intention is to repackage, consolidate or compile in a sourcebook already available published manuscripts (secondary materials) along specific themes for specific audiences, then this becomes a Review Writeshop.

## **Resources and other considerations: What is needed to make this happen?**

After having decided on the objectives, audience and type or types of products to be generated, the next thing to consider is to look into required resource capacities. Who will compose the writeshop team? What facilities will be used and who will constitute the production teams? What are the anticipated costs for the preparatory activities for the writeshop itself and for printing and distribution? Which donor or combination of donors will be involved? Some examples of adaptations made in the writeshop process are provided as prototypes to the steering committee so that decisions on format are based on information of options.

## **Writeshop team members, facilities and logistics**

Ideally, writeshop team members (authors and peer reviewers, editors, artists, resource persons, facilitators, administrative and production/publications staff) should come from the participating organization. This is to enhance the capacity building benefits of this approach. However, this is not always possible since one of the major reasons for using writeshops is precisely this lack of capacity and related skills. Ideally, such teams can be a mix of insiders and outsiders (i.e., consultants).

### **A checklist of rationale for developing case-based texts through writeshops**

- To demonstrate project or program outcomes
- To reflect on the experiences and learning (standard practice that is internally-driven)
- To scale up for adaptation
- To inform donors and stakeholders
- As part of the capacity building of project officers
- To fill an information gap (derived from the field)
- To produce an effective advocacy tool (evidence-based advocacy)

### **Some of the internal capacity concerns normally addressed by writeshops**

- When key authors or project staff do not have enough time to write their own experience, then bringing them together to a writeshop facilitates the writing process.
- When skill building is an important element of documenting the experiences and collective analysis is called for.
- When project staff in the same organization or project need to share and communicate their own experiences and learn from each other.

The template on Roles and Responsibilities in appendix section provides a listing of the different writeshop team members needed with details of their respective roles and responsibilities.

Depending on the specific objectives, specifications of the desired knowledge product to be developed, capacity and resources available, the actual composition of the team and the logistical requirements may vary as the examples of writeshop adaptation (elsewhere in this book) will show.

# Organizing Writeshops

Organizing a writeshop is a long and intensive process with many preparatory activities that need to be done. It is therefore important to ensure that preparations are done way ahead of the scheduled writeshop. The succeeding sections<sup>5</sup> describe what these activities are: from development of themes to guide the selection of topics to the publication and distribution of the repackaged materials.

## Before Writeshop

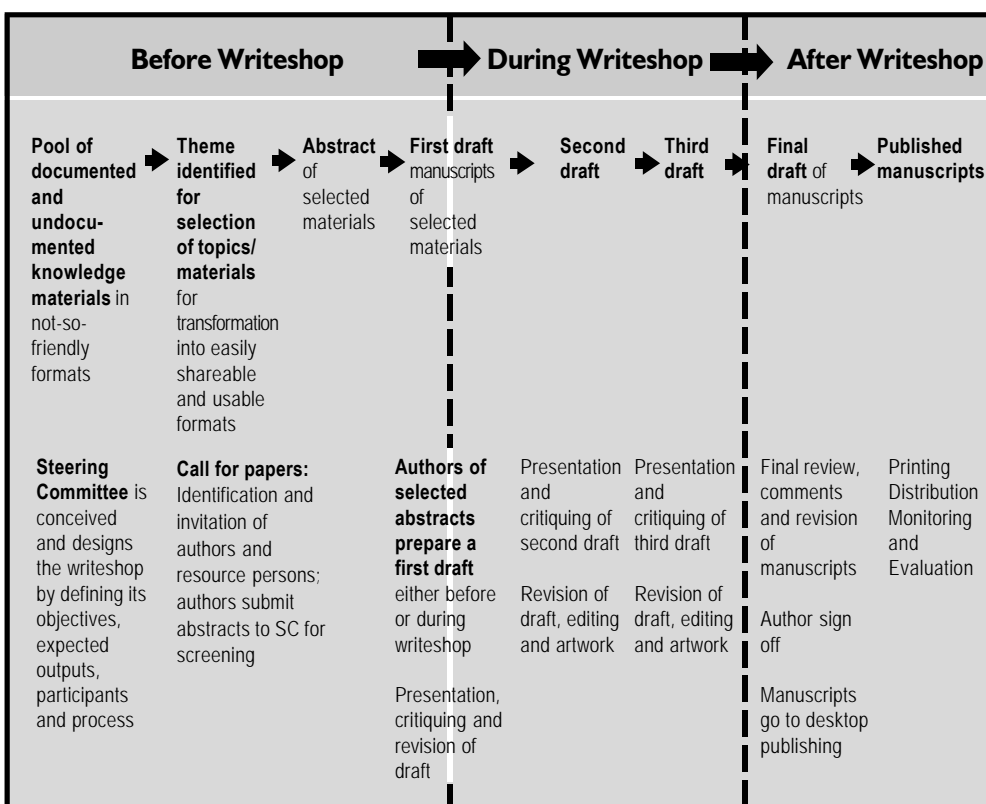
Ideally, a steering committee is established to prepare and plan for the writeshop. The committee plays the role of the core group which takes care of the conceptualization and implementation of the writeshop. It can be composed of the key players of the writeshop or in case of collaborative work, of representatives of the key organizations involved in the writeshop.

Initially, the steering committee designs the writeshop by defining its objectives, expected outputs, participants, and process. This is followed by theme development, where potential topics and themes for the envisioned publications and materials are identified. Next, authors and resource persons (experts or project team members) are identified and invited to develop first drafts of case studies or papers on each topic through the Call for Cases. Each identified author prepares an abstract and sends it to the steering committee for screening. This process further allows the steering committee to review the topics and themes earlier identified and to include new ones emerging from the screening. The committee sends a feedback on the abstract and an approval to develop a first draft of the papers. The committee also provides instructions to authors about the recommended writing styles.

---

<sup>5</sup> The sections contain mainly excerpts from *Documenting Best Practices and Lessons Learned: Guidelines for Conducting Writeshops* by Emilita Monville Oro (IIRR) and Gerard Baltissen (KIT-Royal Tropical Institute), Kuala Lumpur, Malaysia. 2009.

## Evolution of drafts in a writeshop setting



The "Roles and Responsibilities" of the different writeshop team members (authors, facilitators, resource persons, production staff and more), may all be found in the Appendices section. It is also early in this stage when it is made clear what sort of copyright arrangement will be made.

## During Writeshop

The actual writeshop involves writing as many as three draft versions of the manuscript. To be able to write the first draft of materials, authors need to be provided some technical inputs and guidelines, depending on what kind of materials will be written. Case studies, case categories and community case stories are common forms of documentation. Guidelines are essential if participants' only writing experience is project report writing.

Where resources permit, a pre-writeshop event is suggested. Three days can be allocated to prepare and assist the authors in developing their first drafts. Technical

## A Case Story

- Is not as detailed as case studies
- Focuses more on telling the story of what was done and how it was done
- Is prepared in a narrative form and ranges from one paragraph to two pages
- Is user-friendly and more accessible to development workers
- Uses pictures to make it more visually interesting

From: Monville-Oro, E. (IIRR) and Baltissen, G. (KIT-Royal Tropical Institute). 2009. Documenting Best Practices and Lessons Learned (Guidelines for Conducting Writeshops), Kuala Lumpur.

inputs on writing case studies, on style and creativity are provided prior to the writing session. Several of the organizations represented in the Writeshop Methodology Review included a writing skills training component (and even photography in the case of IFAD Philippines).

A pre-writeshop can be used to develop drafts based on the guidelines provided by the writeshop coordinator. Even without a pre-writeshop event, it is also possible to link the authors with a workshop editor for guidance in writing the first draft of the case study. It is very important to adopt a writing style proposed by the steering committee.

If the first draft has been prepared prior to arriving at the writeshop, the authors present this at the first plenary for a critical review (mainly of content) by peers, the resource persons and editors. The authors are expected to note down the comments, and subsequently, make revisions in a second draft. A second draft must include illustrations and other useful graphics, an artist provides this assistance. Experienced desktop publishers work on the draft and artwork to produce a second draft. Each participant then shares the revised draft for further reviews. The audience critiques and makes further suggestions. The draft is thus revised further to generate the third draft. Towards the end of the workshop, the third draft is made available for all participants for final comments and revisions. This could be done via presentations in plenary or simply via desk-based reviews. An editor then puts all final drafts together. The actual writeshop may last one week.

## After Writeshop

### Final Editing

After the final drafts have all been submitted by the authors, post-writeshop activities follow. These include final editing, publishing, distribution and getting feedback from potential users and readers. Front matters such as Foreword, Acknowledgements, Introduction, Table of Contents, References of Information Resources, and others are also finalized.



In final editing, the editors spend time to proofread paying special attention to language editing. The document is further checked for clarity, succinctness, and proper credits.

## **Publishing, distribution and readers' feedback**

For organizations working in development, upholding the value of knowledge sharing, a non-restrictive copyright policy is generally adopted such as no-copyright, copyleft, creative or a common license. This means that the publication can be readily shared, downloaded, reproduced and even translated, provided that the source is properly acknowledged and cited.

Another important requirement is to secure ISBN (International Standard Book Number) from the Library of Congress for a certain fee. ISBN is written on the publication. With the camera-ready materials, publishing can already be done. A reputable publishing house is contacted to print the materials, given the agreed specification. Available resources should be considered when making decisions on these. Once available, copies of the publication are distributed to the intended audience.

Getting feedback from readers allow the publication to be assessed in terms of its relevance and benefits, as well as satisfaction of the readers. This can be done by conducting a survey through a prepared form, or by focus grouped discussions. Comments and suggestions generated can be used as reference and input when developing follow up or similar publications.

### **An example of a copyright statement:**

This publication has no copyright and IIRR encourages the use, translation, adaptation and copying of materials. Acknowledgements and citation will however be highly appreciated.

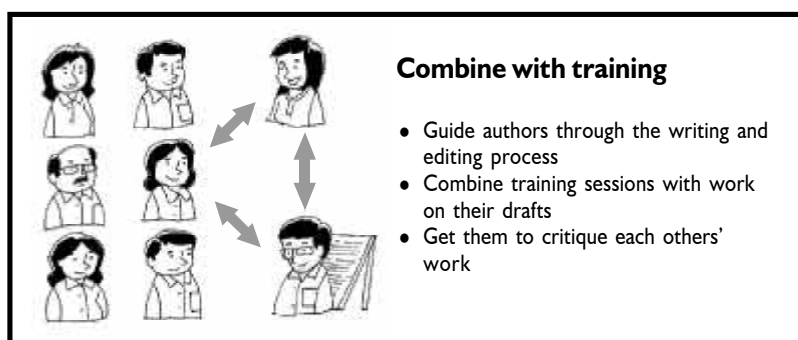
### **Copyleft is a bit restricting than no-copyright policy. An example of copyleft statement:**

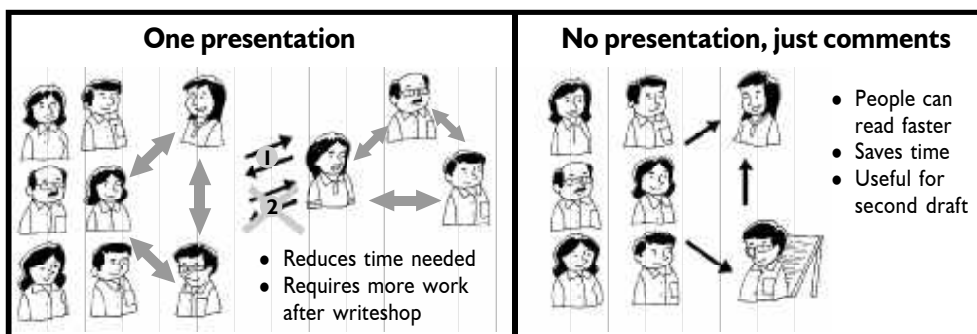
Anyone may use the innovations described here and modify or develop them further, provided that the modified or further developed innovations or any follow up innovations, of which the innovations described here are an element, are likewise freely available and any description of them includes this provision and acknowledges the source of information.

# Adaptations to the Writeshop Process

Writeshops have been mainly adapted or modified when organizations do not have enough financial and human resource capacities to hold writeshops outside of their offices, cannot afford to have their project staff stay away from their field work and need to train these field staff to properly document field experiences and lessons. An option in such cases has been to hold writeshops within the office premises; spread it over weeks or months to fit into project staff schedules and commitments; and, integrate staff writing skills training into the writeshop process. Hired facilitators are also capable trainers in writing. There are many ways to shorten time requirements, such as: (a) preparing drafts prior to writeshops, (b) doing mainly sub-plenaries for the early review of articles, (c) reducing the draft presentations to only one instead of the standard recommended two or three presentations, (c) doing away with the presentations all together (each participant is asked to read and comment on the drafts prepared by the other participants), and (d) using the internet for commenting on the drafts.

For the IDRC-CIDA Sourcebook on *Transition Towards Resilience: Coping with Disasters* and the CIP-UPWARD *Global Sourcebooks on Agricultural Biodiversity* and on *Participatory Research and Development*, electronic communications technology was used in facilitating feedback, which meant less face-to-face and peer review but more interactions between consultants/facilitators, the editors and artists. Particular to the





CIP-UPWARD sourcebooks, there were even no authors involved since *all* the materials needed only repackaging and no new matter was added. This process of keeping track of individual feedback, coordinating revisions and managing various versions implies the need for a point person and full time coordinator.

The CIP-UPWARD global sourcebooks involved over a hundred authors/contributors. It would have been difficult to bring all of them to a writeshop. Using electronic communications technology, the authors/contributors were informed that their articles were being repackaged by editor-artist teams and subsequently they got to review them. They were never at the actual writeshops. The actual writeshops were carried out as described below:

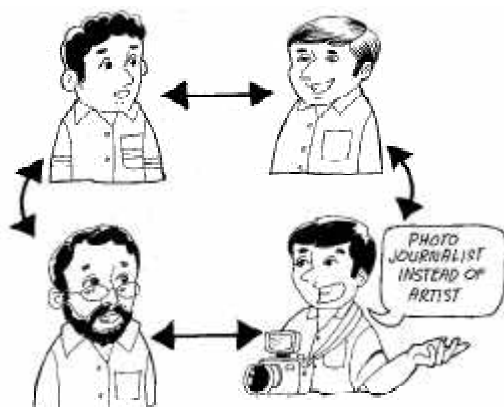
In the BEFORE WRITESHOP stage in producing the CIP-UPWARD global sourcebooks, special effort was made to: 1) cover previously unpublished and lesser-known work through secondary materials and literature search in websites and printed materials and; 2) translate original contributions written in other languages like Spanish and Thai, to English.

*Two writeshops were held to repackage the contributions under the close guidance of the Working Group (WG). The following description highlights the process: A pool of editors, illustrators and layout artists helped in repackaging contributions selected by the WG. Each editor-illustrator worked on a number of articles which were then forwarded to the layout artists. During the initial phase of the writeshop, the editors themselves did a "mock" presentation of one or two repackaged papers, as a test run, to guide them in repackaging the remaining papers. Second drafts were produced based on comments from the WG. These were further edited by the managing editor prior to sending them to original authors for feedback and comments. The experience thus far has been very positive and with strong endorsement of the repackaged version. Authors have in fact valued the assistance provided by writeshop organizers. The second writeshop aimed at doing additional papers to fill the gaps in the compilation in terms of topics, sectors and issues. A pretesting of the repackaged articles, using respondents representative of the target user groups was also done and the generated suggestions were considered in the revisions.*

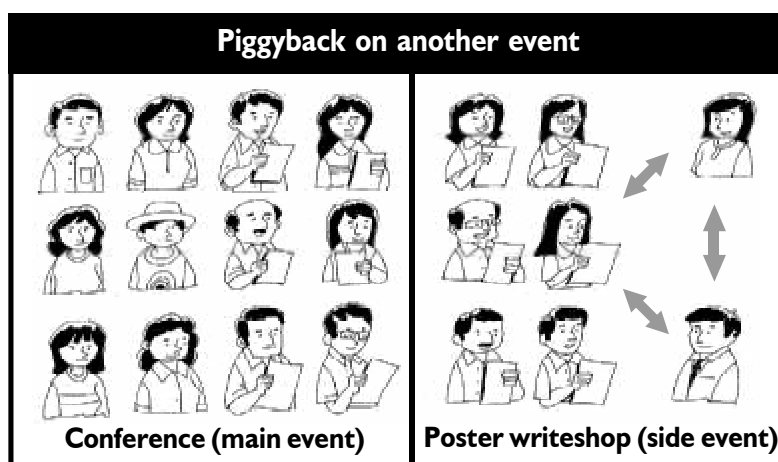
With the *CBNRM Sourcebook* in Cambodia, services of translators were needed to address language differences between local authors and foreign peer reviewers and resource persons. Aside from usual editorial and design guidelines developed for editors and artists, a set of guidelines had to be developed for peer reviewers.

The IIRR Africa experience in using Writeshop to Produce a Graduate Textbook in Natural Resources Management, besides peer reviewers, university students were invited to participate. During discussions in the Writeshop Methodology Review Workshop, the need for an "instructional designer" on the team was emphasized, because of special technical requirements for producing textbooks.

In the case of *The Poor in Times of Crisis* publication, IFAD wanted it to contain newsworthy project stories of how the rural poor cope with crisis situations. To do this, it commissioned a couple of newspaper editors and a photo-journalist to be facilitators. They also acted as trainers, providing inputs and coaching field staff on how to write and how to take good photos. No artist was hired. Since the stories had to be newsworthy and facts had to be validated, the process also involved going to the field and interviewing people in the communities to ascertain facts.



Another adaptation to respond to resource limitations is to piggyback the writeshop process to another event or do a smaller writeshop within a bigger



writeshop. The CAPRI *Resources Rights Posters* which evolved during coffee break on a writeshop in India on *Property Rights and Collective Action for Sustainable Development*. This happened because of the recognition of an opportunity to seek inputs from participants during several coffee breaks! The draft posters series, however, were produced *prior* to the workshop.

In the IIRR writeshop experience to produce materials on reproductive health, instead of developing written manuscripts, the end products were posters and flipcharts. Therefore there were no drafts to be developed before the actual writeshop. There were no editors, only artists or illustrators who worked together with the health workers and community leaders to develop the posters and flipcharts. Following were the detailed steps utilized:

1. The facilitator provides an orientation on the writeshop process. Participants agree on roles and responsibilities, ownership, distribution of the drafts and identify plans to produce the final products.
2. Health workers identify the concepts and terminology which they consider difficult to communicate. The facilitator then works with the participants to address these problems.
3. Participants break up into mixed groups of 5 to 6 people, to further refine the identified concepts and terminologies and to generate new ones.
4. Health workers/technical experts describe each concept and terminology in detail to community representatives and the artists. The facilitator assists to ensure understanding.
5. The community leaders suggest locally relevant analogies that best describe the technical concepts or the scientific terms that need to be communicated.
6. The analogies are debated for logical consistency and cultural relevance until the group members agree that the concepts and analogies are useful in their context.
7. The artist draws a draft sketch to illustrate the message to be conveyed and place it beside the analogy that farmers suggested.
8. The participants comment on the illustration until they agree to have clearly represented both the analogy and the concept to be communicated.
9. The complete set of illustrations is presented in plenary for additional comments and suggestions, and to ensure that all required concepts are addressed.
10. The illustrations are further refined and presented for a second time. Final comments are incorporated and the posters and flipcharts are produced for testing in the communities.

The writeshop processes used in the production of the sourcebooks and posters/flipcharts can be used for developing textbooks and training materials.

In the sections towards the end of this publication, draft guidelines and a few templates are provided to assist beginners in better appreciating the writeshop process. It might even allow them to experiment, adapt and have fun with the process while enjoying the many benefits it has to offer. Maybe new variants in the general writeshop process will emerge from these new users confronted with a different mix of context and challenges in transforming and using available knowledge.

# Lessons, Principles, and Issues in the Design and Implementation of Writeshops

The following principles, lessons and issues were drawn from the Writeshop Methodology Review Workshop discussions and case presentations:

1. The objective (impact and relevance) of the writeshop activity should be clearly emphasized at the onset. Writeshops are not just about producing project documents for learning and sharing but can also very well contribute to improving the writing and analytical skills of field staff. They can improve staff morale and the community's ownership of the project experience.
2. With respect to the writeshop team, there is an implied situation that many of the recent groups or organizations/institutions that are into or planning to go into sourcebook production are new not only to the writeshop process but also in documentation and publications work itself. Therefore, a principle forwarded is that the design of writeshops for sourcebook production should integrate capacity and skills building agenda.
3. For first-time users and having participants with minimal writing skills, success of writeshops depends on having:
  - Strong and skilled facilitators especially for managing heterogeneous groups
  - Clear expected results and templates e.g., for products like newsletters, policy briefs, etc. for clear guidance especially to those weak in writing
  - Clear arrangement and understanding of what is to be accomplished
  - Clear articulation of what is in it for everybody
4. It is important to capture field experiences to generate evidences for advocacy work. Writeshop is effective in capturing these field experiences especially those stories produced in case-based texts which are often lost when the presentations are made by technical specialists and researchers. Gathering baseline information and doing community field interviews may be part of preparatory writeshop activities.

5. Writeshops may not always be the most appropriate process for capturing lessons from the field nor should a writeshop be seen as a "stand-alone" process.
6. For writeshops to be successfully implemented within an organization, it is important to formalize and streamline cooperation and coordination between the project team and the communications unit. This is at best emphasizing the importance of coordination in any writeshop process — especially between the field people who will do the first crack at documenting the experiences and lessons; and the communications staff tasked for the final packaging of the documented experiences and lessons.

To be authors of writeshop products serves as incentive to field workers and the community and also gives them a sense of fulfillment.

7. Writeshops have to be planned well in advance and integrated early in the project processes if the cited objectives and desired impacts are to be realized.
8. Integrate the writeshop activities in the annual work plan and budget of the organization. When locating writeshop into the project cycle or within the knowledge management strategy of the organization, it may be best to use it in conjunction with other processes like systematization and documentation of best practices.
- 9a. Participation in the writeshop process is important and therefore there is need to:
  - Consult and engage users of writeshop products in the writeshop process. This is critical especially if the writeshop products are not only for project learning and management purposes but for sharing with others.
  - Involve staff at different levels to write and validate field-based evidences and lessons. A major challenge in running writeshops is in managing a heterogenous group of participants with different skills, skill levels, and perspectives. Therefore, being able to level off on these differences by engaging everyone in the various project documentation activities can go a long way in systematizing project documentation and capturing of field-based learning.
- 9b. Peer review and feedback is important. This is one of the most appreciated and recognized feature of writeshops which ensures quality of the products while at the same time serves as a way for improving staff writing and analytical skills.
10. Pertaining to the manuscripts or the materials themselves, a principle that can be seen as common to the three types of writeshop outputs is that they should be based on field-derived lessons whether these are from documented or non-documented experiences. However, for sourcebooks, these are not so particular about the time the experiences were generated for as long the information is relevant to particular contexts and situations. With textbooks,



these have to be current i.e., consistent with most-recent and time-tested practices and paradigms that are presently acceptable to the academic community. And with policy briefs, not only do they have to be current but should be delivered at the right time and proper timing. The right time meaning that the overall situation or environment calls for it (the opportunity is there); and right timing to mean that policy briefs reach the policymakers at a time that they need the information or in a position to act on it.

11. For textbook production, an emerging principle is that a participatory approach to producing textbooks can result to better learner-orientation of the books — which translates to higher relevance or acceptance of the produced materials. With policy briefs, there is still the question of who can best write them — the technically-oriented authors of the research studies or the non-technical development practitioners with a good grounding of what policies may most affect the communities? Emphasis should be given on the need for researchers to be also adept in preparing policy briefs. Likewise, other stakeholder groups, for example among civil society groups, who can benefit from their researches, may also help in transforming researchers' works into policy briefs for consumption by policymakers, the media and the general public. Writeshops can provide the venue for researchers, policymakers and field practitioners to meet and develop policy briefs that will connect research and policy to the communities.
12. Sourcebooks (and all writeshop outputs for that matter) should allow free use of material for non-commercial purposes or (where insisted upon) have copyright but having a statement saying it can freely be used by anyone with specified conditions, mostly about acknowledging and providing credit.
13. Getting feedback from readers allow the publication to be assessed in terms of its relevance and benefits, as well as satisfaction of the readers. This can be done by conducting a survey through a prepared form, or by focus group discussions. Comments and suggestions generated can be used as reference and input when developing follow-up or similar publications.

# Writershop Guidelines

The following sections provide additional pointers or sets of guidelines for those planning to use writershops to produce (a) case-based texts, (b) textbooks/training materials, (c) policy briefs, and (d) publications resulting from review writershops. They are still work in progress documents and were initially developed by the participants to the Writershop Methodology Review held in the Philippines in July 2010. These four sets of draft guidelines may later be developed into individual guideline booklets where the organization of the writershop and more specific templates will be included particular to the type of writershop product to be produced.

## Guidelines for Designing Writershops to Produce Case-based Text<sup>1</sup>

### The Product: Case Studies/Case-based Text

#### Audience

Audience should be identified based on the objective and rationale for the sourcebook. Audience identification is critical in deciding on an appropriate product and relevant packaging approaches. The audience and objectives should be defined in the introductory section of the book.

---

<sup>1</sup> *Drafting Team: Shalini Kala, Isaac Bekalo, Maksat Abdykaparov, Jennifer Liguton, Hidelisa de Chavez, Jose Roi Avena, and Li Chanjuan*

Audience for primary and second level scenario

- Peer projects
- Government

Audience for third level scenario

- Donors
- Policymakers

## **Language**

It is important to produce the book in one base language and format, for possible adaptation in local language.

## **Format/Packaging**

Define format and length of each chapter of the publication based on the audience, content, language and objectives of the book. Cost and distribution implications should also be considered. An example of the format of sourcebook for a specific audience is provided below:

For peer projects

- Bound, pocket size or loose leaf books for use in the field
- Also available in electronic versions (web-based)

Identify the key by-products of the project specified in the project design to ensure that the formats of the proposed outputs are clear.

## **Content**

- Define the boundaries and/or scope of the publication. Content identification should be flexible and dynamic, and could be done either before or during the writeshop.
- Identify the primary audience and objective of the sourcebook and tailor-made the content based on the audience and objectives.
- Identify where the cases can be sourced based on the scope of the book and seek balance on the case representation (finding the information).

## **The Process: Writeshop**

### **Planning and Management of the Writeshop**

Develop checklists for the preparatory and implementation stages, for content management, as well as for logistical and administrative preparations. Some of the key elements of the checklists are as follows:

- Decision-making processes and decision-makers. Determine who makes the decision on the content of the sourcebook and authors.
- Coordination and facilitation. Identify who coordinates/leads the day-to-day planning and operation of the writeshop. Decide whether there is a need for external to complement the internal facilitation (or a designated project coordinator)
- Roles and responsibilities. Define the roles and responsibilities of the key players of the writeshop, and the expected outputs of each.
- Participants/authors. They should be selected based on what they can contribute to the workshop, either as for expert inputs, written knowledge, potential users of the book, local people, etc.
- Production staff. Based on the writeshop design, decide whether you need editors, artists, etc.
- Content and structure. This can be decided by the project team as part of their planning process.

*Note: Full checklists have been developed by IIRR through the years and can be incorporated in this part of the guidelines (see templates in appendices).*

### **Content Validation Process**

- Experts brought into the workshop to validate (may be from multiple countries applying the same methodology)
- Systematization
- Project-driven process
- Consultants to write the cases

### **Ensuring Utilization of the Casebook/Sourcebook**

- Develop and implement a dissemination and distribution plan.
- Encourage buy-in from key stakeholders and decision-makers (high-level launch of the book)

## Guidelines for Designing Writeshops to Produce Policy Briefs<sup>2</sup>

### The Product: Policy Briefs

#### Audience and Objectives

Primary audience: Policymakers and key policy actors at:

- National level:
  - Members of the legislature
  - Executive: Cabinet Ministers/Secretaries, Deputy Ministers/Secretaries, other senior civil servants, and technical staff of members of the legislature and cabinet
- Sub-national level: Provincial and district governors, mayors and leagues of local government unit officials, policy and development planning officers, commune councilors and community leaders

#### Secondary audience:

- Regional and international community
- Media (print and broadcast)

#### Objectives:

- To inform decision making; to offer recommendations and/or courses of action
- To convince the policymakers/decision makers of the urgency of the problem and to advocate/influence for the preferred or alternative courses of action
- To increase further understanding of the issues and their implications

#### Format

- By definition it is 'brief' but the Policy Brief has to suit the context and may therefore be between 2-6 pages, preferably written in an 8-1/2" x 11" paper with a self-cover and in a language that suits the audience.

---

<sup>2</sup> Drafting Team: Jennifer Liguton, Denise Melvin, Keam Han, Sudhirendar Sharma, Jose Roi Avena.

## **Content**

- Relevant for policy making
- Addresses issues of current political interest, or highlights issues which have not been adequately addressed
- Clearly states the key challenge, and advocates a specific course of action or clearly presents the pros and cons of several alternative actions
- Recommendations should be backed by solid evidence
- Refers to the main source of evidence and includes a short bibliography for further reading
- Written in a non-technical or jargon-free style
- Persuasive

## **Structure**

- Title - contains the key message
- Summary of points and key policy implications or recommendations
- Introduction - general statement of the topic and its context in terms of its key challenges and their policy dimensions. The objective or purpose of the Policy Brief is mentioned here.
- Main Body - presents the key messages and story to be conveyed based on the results/findings of the study, and discusses the policy implications and/or recommendations in more depth. This portion includes the arguments and evidence backing them as shown through data/tables/graphs/illustrations. Case studies and examples may be presented and contained in accompanying boxes.
- Blurbs to highlight key messages
- Summary and conclusion - a summary of the key points, arguments and policy implications is presented here and a conclusion on such basis is drawn. Or concluding remarks are given to sum up the write-up.
- References
- Contact details

## **Authors**

- Ideally, the authors should be able to reduce 'noise from signal' in locating the 'key messages' emanating from diverse soundbytes.
- Invite people who are very familiar with the policymaking process
- Invite subject matter experts

## **The Process: Writeshop**

### **Before the writeshop**

- The organizer decides on the issue and the writeshop design, e.g., objectives, outputs, schedule, participants, resource requirements and overall design
- Invite the participants, i.e., authors, editors and facilitators

### **During the writeshop**

- The facilitator gives a short briefing to familiarize participants on the nature of a policy brief.
- The facilitator introduces the participants to the writeshop procedure.
- Depending on the number of expected outputs decided on, each author presents his or her draft to the other participants in plenary. Guided by the facilitator, they comment on and critique the draft, and the author and an editor take notes.
- After the presentation, while the next author is presenting, the editor and author meet to discuss the manuscript and comments. Together, they revise the manuscript.
- The author presents the revised (second) draft to the plenary, and the other participants again offer their comments.
- The author and editor meet again to revise the manuscript, producing a third draft.
- This third draft is given to the participants at the end of the writeshop; they have a final opportunity to make written comments on it.

### **After the writeshop**

- The editor collects the manuscripts, revises them and checks any final queries with the authors via email.
- The final draft is laid out, proofread, submitted for approval, printed and distributed.

## **Evaluation**

### **Before Publishing**

- The rigorous process undertaken, i.e., several layers of review/critiquing, to come up with the final product already serves the purpose of pre-publication evaluation.

## After Publishing

- Where objective measures would be difficult to obtain, the policy briefs' clients' own assessment can serve as useful proxies to indicate that the briefs are serving the policymakers' immediate requirements, such as the need to make informed decisions.
- In this respect, qualitative indicators like awareness/access to the material, actual usage, and degree of satisfaction could be employed and assessed. A Client Satisfaction Feedback Form may be designed which should yield the following information:
  - % of consumers who are aware of or had access to the policy brief
  - % of consumers who have read and used the policy brief
  - % of consumers who were either 1) not satisfied, 2) satisfied, or 3) very satisfied with the policy brief to the extent that it informed and facilitated their decision-making
  - Reasons for not using the brief even if they were aware of or had access to it
  - What the policy brief consumers liked most/least about the product
  - Suggestions for improvement of future products
  - To build a wider base for analysis and at the same time triangulate the results obtained, the evaluators may wish to include as survey respondents not only the policymakers themselves but also their deputies and senior technical staff who may be responsible for pre-processing or doing complete staff work (CSW) on the policy brief before it reaches the policymakers themselves.



## Guidelines for Designing Review Workshops<sup>3</sup>

### Context

This draft guideline for Review Writeshops is for someone who has never developed a sourcebook from secondary materials.

### The Product: Sourcebook

#### Audience and objectives

Publication is targeted at:

- Primary audience: field practitioners, trainers
- Secondary audience/other users: donor, researchers, school teachers, academicians
- Using reviewshops as opportunities to strengthen local capacity

### Content

What is the theme of the book? How do you define the scope of the publication? What are the boundaries of the theme: what do you include and what should you leave out?

- increases the scope of the content
- encourages flexibility
- increases creativity about the collection
- balances conceptual vs practical information
- narrowing the gap between research and practice; deriving framework from field-based experiences/evidence
- shortening of articles enhances usability and widens distribution
- linking field-derived learning to policy

### Structure

How should the content be organized? What chapters and sections should there be, and how should these be ordered? What types of information should it contain: cases, instructions, descriptions, recipes, analysis, etc.

- Establish a boundary (30-50 topics max), subject area, geographical balance/focus
- 4-6 pages per article

---

<sup>3</sup> Drafting Team: Julian Gonsalves, Priyanka Mohan, Khanhkham Ouanneaudom, Hydee de Chavez.

- Outline becomes the basis for gathering articles (flexible and modified as we progress)
- Iterative approach is useful
- Shortlisting of potential materials based on usefulness, relevance, adds new knowledge
- Sourcebook is not guided by a structure but depends on what information you came up with from the materials and creativeness (grounded theory)
- Materials that would get quickly outdated will not be included in the article

## Sources

How should you identify secondary sources? Who selects them? How can you get approvals to use and adapt these materials? How about authorship and copyright issues?

- Increasing reliance on the internet and working group/advisory committee in terms of thematic areas
- Gaps can be addressed by commissioning articles from primary authors
- Ensuring authorship is recognized and credited
- How? Depends on what the thematic area is based on gaps and needs, context of the book
- Working group/Advisory committee- technically knowledgeable/experts on the subject/theme, good communication skills (writing, editing, analyzing/synthesizing skills, facilitation/coordination), innovative, well-informed of the critical issues, negotiation skills
- Copyrighted materials- require author's/publisher's permission for repackaging
- For non-copyright materials, prior to repackaging - ask for author's consent, once repackaged, the author needs to sign off/finally approve the material. For ethical considerations, we still need to inform the publisher.
- Limitation: for copyrighted material could be cumbersome and could take long, willingness to drop articles in case the clearance is not obtained from author
- In rare cases, when necessary locally made materials in different languages can be translated to English.

## Process

How much time do you need? How should the materials be presented and reviewed? What preparations are needed? What kind of staff and production teams? Face-to-face vs electronic? What is the role of the editors? What guidelines do they need? What is the role of the advisory group? How to develop and evaluate artwork? What follow-up is likely to be required?

- 1-1 ½ years (multi-institution/organization/single institution)
- Phases:
  - **Pre-Reviewshop.** Identification of sources/topics/initial outline, people/actors, orientation workshop for production staff and working group, logistic preparation, call for contributions, preliminary screening/shortlisting/pre-editing of contributions, provision of prototypes and sample articles
  - **During Reviewshop.** Editor-artist team (can make decisions on their own), editor coordinates the process, repackaging process, working group review the repackaged materials
  - **Post-Reviewshop.** Review and quality control of draft manuscript by advisory committee/working group depending on scope (structure, content, appropriateness of illustrations, address gaps), finalization of the product by the working group/production.
- Full-time coordination
- Production staff comprises of 5 editors, 5 illustrators and 2 layout-artists (each editor-artist team handling approximately 8-10 articles)
- 4-5 working group members
- Sourcebook production could have a local/international advisory committee/working group depending on the scope and content
- Reviewshops by working group/advisory committee for quality, critical feedback on content and relevance of illustrations to content, titles, chapter clustering, general quality of the product
- Writeshops to review draft materials
- Artworks are hand-drawn, line drawings and less shading for reproduction purposes, technically and culturally appropriate
- In case of conflicting concerns from reviewers, then a follow-up is recommended
- Production team and review committee/working group meets face-to-face during the orientation and reviewshops only and no face-to-face encounter with authors
- In few cases where field worker experiences are included, the recognition of field workers and co-authors are ensured.

### **Evaluation. How to evaluate the end-product before it is published? After it is published?**

- Pretesting in terms of comprehensibility, attractiveness (e.g., cover), acceptability (content/illustrations), utility, relevance, culturally appropriate illustrations
- Use and uptake of publication and "spin-offs" of products
- Evaluating the sourcebook
- Tracking of distribution

# Guidelines for Designing Writeshops to Produce Textbooks and Training Materials<sup>4</sup>

## The Product: Textbook and Training Materials

### Audience

The textbook as well as training materials should be oriented to learners and follow a learner-centered approach. While textbooks are mainly to be used in formal education, training materials are for nonformal education and training. The textbooks and training materials should help learners to acquire skills, knowledge and new behavior. Textbooks and training materials should be relevant as reference materials for at least 5 years.

### Format

The textbooks as well as training materials are usually in book form, printed in A4 size paper with about 50-300 pages. They can be either hard-bound, ring-bound or loose-leaf depending on resources, audience and preference of the users on how to use them. Where possible, all materials should be written in local language.

### Content

The number of topics and sub-topics varies depending on the objective/s in the curriculum and in the training design (in the case of the training manuals) the textbooks/training materials aim to cover.

### Structure

A textbook would have the following parts:

- Introduction/Users guide
- Overview materials. These are the first few chapters of the textbooks or the first module of a training material. These materials provide an overview of the basic concepts, definitions and the overall framework for the different parts of the textbook/training material.
- Main content. These are the materials that are in the main body of the textbook. They directly contribute to the achievement of the purpose of the textbook/training materials.

---

<sup>4</sup> Drafting Team: Maksat Abdykaparov, Marise Espineli, Emily Monvile Oro, Pech Sithan.

- Activity/session guides. These provide step-by-step instructions to the learners in order for them to learn the material
- Bibliography or references - gives credibility to the material

A textbook written with 30% visuals such as illustrations, tables, graphs and boxes is considered more appealing to the learners.

### **Authors**

The authors should be field practitioners subject matter specialists, researchers and/or methodologists. Preferably, they should have writing skills. The number of authors should not be more than 20 and their selection should be based on experiences, capacities, and skills. One finds them through existing networks, inviting selected individuals and as well as through a call for papers if there are no identified authors.

### **The Process: Writeshop**

The writeshop process in developing textbooks and training materials can be divided into three main parts: (1) the Pre-writeshop (2) the Actual writeshop and (3) the Post-writeshop.

#### **Pre-writeshop**

A small team comprised of the curriculum development specialist/instructional designer and 2-3 subject matter specialists will be responsible for the identification of the structure and content of the textbook/training materials. Given the objectives, the team lists all the potential topics that should go into the textbook/training manual. The team reviews the long list and prioritizes the materials that go into the textbook/training manual. They do this first by categorizing the materials as follows:

- "MUST KNOW" materials - those that directly lead to the achievement of the objectives
- "NEED to KNOW" materials - those that support the learning of the "MUST KNOW" materials
- "NICE to KNOW" materials - those that are peripherally related but the learners do not exactly need them to accomplish the objectives.
- "NO NEED to KNOW" - materials that have no bearing in achieving the objectives

The team focuses on the first two categories of materials. It identifies writers for the topics that are in the final list.

Ideally, depending on resources, a pre-writeshop activity is conducted for writing the first drafts of the materials. This can be a three-day activity, where authors are provided technical inputs on writing, style and creativity, and guided towards writing the first drafts of their assigned modules, chapters or sessions within the envisioned textbook or training materials. If a pre-writeshop event is not possible, first drafts can be developed by the authors based on the guidelines provided by the textbook/training materials team. At this stage it is also possible to already link the authors with a workshop editor who will guide the author in writing the first draft. The whole preparatory phase is spread through 1-3 months.

### **Actual writeshop**

The actual writeshop can be a minimum of one week aimed at presenting, peer reviewing/critiquing and revising the drafts prepared by authors, until the envisioned outputs are achieved. Editing, artwork and layout can already be done during the actual writeshop, although this can also be done after the writeshop. It is, however, assumed that by the end of the third draft presentation, there will be a semi-finished publication.

### **Post-writeshop**

Copyediting and finalization of layout, artwork, to include book cover and "front matters" such as table of contents, list of acronyms, acknowledgments etc. are completed, producing a camera-ready textbook/training materials, which can be brought to a printer for publishing. The post-writeshop period can take from one to three months.

### **Evaluation**

Initial process of evaluating the textbooks and training materials is done during the feedbacking session in the actual writeshop. Pretesting of the writeshop outputs can also be done by letting a representative group from the target audience to use them. Finally, effectiveness of the textbooks and training materials can be evaluated after being used through various methodologies like survey, focus group discussion, etc.

# Considerations for Using Writeshops in the IFAD Context

Prepared by : Yinhong Sun, Juan Su, Jose Roi Avena and Shalini Kala

## I. Writeshops in the context of IFAD's Knowledge Management strategy

IFAD Projects aimed at reducing poverty generate a great deal of knowledge, in addition to physical and technical outputs. Many of these lessons learned arise from working with local communities. Properly capturing, documenting and sharing, all this knowledge will improve the effectiveness of future poverty reduction efforts.

Through its Knowledge Management (KM) Strategy, IFAD seeks to transform itself into a learning institution. Project staff and partners are encouraged to explore tools and methodologies to document successes and failures, as well record the voices of the poor, for learning and sharing.

Writeshops are a useful knowledge management tool because they:

- enhance the quality of project documentation, while creating opportunities for team work, internal reflection and critical review;
- can produce a variety of related knowledge products geared to different target audiences; and
- strengthen IFAD staff's writing and facilitation skills.

However, there are some limitations to introducing writeshops. Written outputs can only be accessed by literate target audiences. Furthermore, writeshops are only one specific exercise in the project knowledge management process, and therefore, should not be viewed as a stand-alone tool. They may be more effective when used with other tools aimed at generating and capturing knowledge.

Indeed, IFAD project staff will need to consider the entire project learning cycle, design a KM plan to support it, and then evaluate the role, if any, of writeshops in that process.

## 2. Responding to IFAD's specific needs: when and why should writeshops be used

IFAD's Knowledge Management strategy paper indicates that<sup>1</sup>:

- lessons and experiences from project design and implementation are not systematically captured, shared and used to influence policies;
- current monitoring and evaluation (M&E) practices do not adequately provide for learning at the project level or beyond;
- various local knowledge management initiatives are conducted in isolation and with limited perspectives for scaling up;
- learning events are intermittent and not part of project design;
- the planning, production and dissemination of knowledge publications is poor;
- procedures and accountability for the capture, retrieval and management of information are unclear across IFAD; and
- space for knowledge-sharing, learning and innovation is limited.

In the same strategy paper, IFAD resolved to "systematize" tacit knowledge to ensure their "availability to all as a public good."

## 3. Relevance of writeshops to IFAD

Writeshops can be used to document tacit knowledge gained by field staff in the course of their work and to publish it for wider dissemination.

Evidence suggests that writeshops have contributed to:

- improving project staff capacities and performance; this includes improved writing skills and a better capacity to reflect on and analyze experiences to inform project management;
- creating an internal culture of learning and sharing;
- promoting the active participation of beneficiaries and clients in IFAD project processes;
- improving M&E, research, and writing skills of IFAD project staff and partners; and
- speeding up and improving the quality of printed knowledge products.

---

<sup>1</sup> IFAD, *Knowledge Management Strategy* (Rome, IFAD, 2007) <http://www.ifad.org/pub/policy/km/e.pdf>



Writeshops were adopted in conjunction with other KM processes such as systematization and were used for:

- producing field and evidence-based materials that influenced national policy (systematization + a writeshop);
- generating visibility and support, both from government and civil society, for a local community (best practice documentation + writeshop); and
- translating best practices gathered into a curriculum for "school on the air" radio broadcasts, which then opened other possibilities for combining different information technologies and media for wider information – and knowledge-sharing (best practice documentation + writeshop).

Before deciding to use writeshops to document project knowledge, one must consider if sufficient experience is available and if this has been extracted well. For instance, in the case of a project from the Philippines (CHARM), a writeshop to document project lessons had to be preceded by the identification of key learning areas, data collection and analysis.

Generally, the writeshop approach to producing printed materials is relevant<sup>2</sup> when there is a need to:

- pull together diverse experiences gained from working on specific thematic areas;
- demonstrate impact through field experiences and evidence;
- scale up a pilot project, activity or other small-scale innovation; and
- rapidly translate knowledge and experiences into printed knowledge products.

#### **4. Advantages of a writeshop in the IFAD work context**

Advantages of using writeshops include:

- First-hand experiences are written by field practitioners themselves. This makes the document authentic yet simple and easy-to-understand unlike academic publications that field workers may find difficult to use.
- They may be designed to include both peer and audience pretesting throughout the writing process.

---

<sup>2</sup> *Gonsalves, J.F. et al., A Participatory Workshop Process to Produce User-Friendly Information Materials (IFAD, ANGOC, CIRDAP, SEARSOLIN, MYRADA, IIRR) URL*

- They provide an opportunity and space for field workers to sit down, reflect on and write about their experiences.
- Networks among workshop participants continue long after the end of the writeshop itself.
- Writeshops can speed up and improve the production of printed materials. The aim is to develop the materials, revise and put them into final form as quickly as possible, taking full advantage of the expertise of writeshop participants.

The decision to choose writeshop as a tool should ultimately depend on the context and requirements of the IFAD project. Nonetheless, in some cases, engaging external consultants to author publications will be more expedient and feasible for the project.

Before scheduling a writeshop, it is important to consider that<sup>3</sup>:

- the writeshop process is logistically demanding and must be planned well in advance as part of the project learning and sharing effort;
- the process is very intensive; time is sometimes not sufficient, and the process places a high demand on the abilities of the editors and other staff. When working with multiple partners, the post-workshop phase can be slow if every partner wants to have a stake in the final product; and
- writeshops may not be useful for lengthy literature reviews or the presentation of detailed information.

## 5. Deciding on the products

Once a decision has been made to use the writeshop methodology , it is important to consider what product would be most suitable as the output of a writeshop.

### **IFAD project context:**

On-going learning helps improve project performance and validates experiences that feed into innovation, scaling up and sustainability. However, project knowledge is often not effectively captured because of time and skill constraints. Project staff are often fully engaged in project interventions and have little time to reflect and analyse. They may also feel the need for external support in putting together well-written pieces and improving writing skills in general.

---

<sup>3</sup> Derived from Mundy, P. *Adapting the writeshop process* ([www.writeshops.org](http://www.writeshops.org))

## **Products to package and disseminate field experiences:**

Project experience documentation is of interest to two types of audiences: one, internal including implementers, managers, peers and donors; and two, external including policy makers and the rural development community in general.

Field experiences can be presented through different products. For instance, early experiences can be shared through newsletter articles while mature ones can be captured in policy briefs for policy makers or in technical notes for field staff. Similarly, projects can reach larger audiences through rural development journals and news media. Some examples of relevant products that projects could choose from include:

- Project publications
  - Monthly, 6-monthly newsletters
  - Biannual and end-of-project case studies
  - Technical notes and policy briefs
- IFAD national or regional publications
  - newsletters
  - case-study based documents
  - policy briefs for national governments and regional donors
- Others
  - articles for newspapers, magazines and other media
  - rural development journals
  - sourcebooks combining project experiences with available knowledge on an identified theme such as gender empowerment, M&E, knowledge sharing and knowledge management

## **6. Planning and preparing for writeshops: implications for management**

For writeshops to be effective and for them to produce tangible and useful outputs, adequate project evidence or information should be available, analyzed and documented. Ideally, an M& E process or other exercise such as systemization should have generated adequate information for writeshop participants to use or cite. Otherwise a writeshop may end up with a poor output based on information that is of low quality and not usable.

In other words, before customizing the writeshop for its particular context, IFAD project management needs to decide if the process is appropriate for the needs, and to determine if other options would be more effective such as producing video or audio products or materials purely for advocacy purposes. If data collection has not already taken place, then consider another process, such as systematization to first generate the information and evidence needed.

Planning for a writeshop takes place long before it actually happens and it should be included in the Annual Workplan and Budget (AWPB), with clear expectation of output and a good dissemination plan. Conducting writeshops for documenting project experiences should be a self-initiated process rather than responding to external demands. It is only meaningful when the project management feels that there is information and experience available within the project, which can be useful for others to learn about.

Considering the typical time frame of the IFAD projects, it would be realistic to start writeshops from the mid-term review until closure, when mature lessons and experience become available. However, documentation and monitoring of project activities should start from the very beginning.

Ideally, writeshops should be undertaken by an IFAD project's own staff or associated personnel such as consultants and staff from partner organizations working with the project. The advantage is that this staff has good knowledge about the project, exposure to the ground realities and close contacts with beneficiaries.

Project Management Offices (PMOs) may use writeshops for building staff capacity in writing and producing project case studies for sharing and dissemination. However, they need to be realistic about their staff's writing skills and may consider involving external experts with editing or facilitating skills to ensure quality outputs.

Depending on the complexity of the issue, before the writeshop output is finalized and disseminated, it will be useful to seek views and comments from the IFAD Country Program Manager and the Lead Government Agency.

Finally, writeshop management<sup>4</sup> is critical to ensure the production of good quality results. Specific staff members (e.g. the M&E Officer) or team should be

---

<sup>4</sup> See also "Organising a Writeshop" in *Documenting Best Practices and Lessons Learned*; KIT, IIRR and UNAIDS; 2010

responsible for managing the writeshop process. However, skill in managing the writeshop process is gained from practical experience. It would be helpful if the concerned project staff have had prior exposure to the writeshop process and previous experiences in facilitation.

## **7. Assessing the usefulness and effectiveness of writeshop processes**

If writeshops are planned for more than once in the project life, assessment results could help strengthen future writeshops or improve products. Assessments can also be useful for others planning to use the methodology.

Assessment of the use of the writeshop methodology can be applied on two levels:

- the writeshop output - perceived quality and extent of use by the intended audience
- the writeshop outcome or impact - assessing how the use of the writeshop outputs and the networks built among participants led to various spin-offs (e.g., new materials, improved field practices, better community relations)

Assessing writeshop outputs:

- Before the actual publication of printed materials, members of the intended audience pretest the text and illustrations during the writeshop itself.
- For post-publication evaluation, objective measures may be difficult to obtain. In this case, the personal assessment by the intended audience can serve as useful proxies to indicate that the materials are serving the audience's immediate information needs.

Qualitative indicators such as awareness of and/or access to the material, actual usage, and degree of satisfaction could be employed and assessed. A Client Satisfaction Feedback Form may be designed to yield the following information:

- a) % of intended audience who are aware of or have had access to the material
- b) % of intended audience who have read and used the material
- c) % of intended audience who were either 1) not satisfied, 2) satisfied, or 3) very satisfied with the material to the extent that it served their information requirements

- d) Reasons for not using the material even if they were aware of or had access to it
- e) What the intended audience liked most/least about the product?
- f) Suggestions for improving future products

A small survey could be administered to assess writeshop results which could be validated by convening small focus group discussions among the intended audience.

# Appendices

## **A. Sample Templates and Checklists for the Management of Writeshops<sup>1</sup>**

- 1. Roles and Responsibilities**
- 2. Workflow in a Writeshop**
- 3. Workshop Process Flow**
- 4. List of Equipment and Supplies**

## **B. Information Resources**

---

<sup>1</sup> Many of these guidelines were developed at IIRR over the years. Others evolved from efforts in other organizations. The editors are grateful to Dr. Paul Mundy for compiling the original checklist. These templates were further revised and adapted at the workshop and those versions are included in this section.

# Roles and Responsibilities of the Working Group or Production Team

## Writershop Coordinator

- Coordinate and manage the entire workshop process

### Detailed responsibilities

#### Before writershop

- Coordinate the selection of topics and participants
- Invite participants to the writershop
- Prepare detailed guidelines for authors on preparing their draft manuscripts
- Select writershop staff and delegate responsibilities accordingly (editors, artists, logistics, computer, photocopy operator and computer technician)
- Ensure that all participants understand their roles and responsibilities
- Share objective/s and draft agenda of the writershop with participants and the working group

#### During presentation of first and second drafts

- Chair the first few manuscript presentations and discussions
- Ensure that participants keep within the time allotted for each session
- Ensure that comments are relevant and useful
- Request other participants to take over the chairing of subsequent sessions

#### After presentation of first and second drafts

- Ensure that author and editor meet to discuss the manuscript

#### During all presentations

- Manage overall budget and finances with assistance of logistics coordinator
- Make adjustments and be flexible with the work flow or timetable as needed



- Ensure that all participants and workshop staff understand and perform their roles
- Ensure that work flow is smooth
- Solve problems as required

## **Authors/Presenters**

- Prepare, present and revise manuscripts
- Provide constructive comments and suggestions for other manuscripts

### **Detailed responsibilities**

#### **Before writeshop**

- Prepare first draft of manuscript (text and sketches for illustrations) according to guidelines

#### **During presentation of drafts**

- Present manuscript using overhead transparencies of draft pages
- Take notes of comments and suggested revisions
- Seek comments and suggestions for illustrations

#### **After presentation of drafts**

- Discuss manuscript with editor
- Revise manuscript (with editor)
- Discuss illustrations with artist

#### **During all presentations**

- Provide constructive comments and suggestions for improving the manuscripts presented
- Ensure all the articles are finalized in acceptable form between coordinator/ editor and graphic artist/illustrator

## **Other Resource Persons**

- Provide comments and suggestions on the content, the flow of information, relevance of illustrations and its positioning to the text, highlight gaps, highlight/suggest alternatives when a paper can be revised and improved on

## **Detailed responsibilities**

### **During presentation of drafts**

- Provide detailed written and oral comments on the manuscripts (text and illustrations) which are presented
- Provide written comments and suggestions to the author (if appropriate)

### **After presentation of drafts**

- If necessary, assist the author in revising the manuscript
- Make written contributions to add to a manuscript, if relevant

### **During all presentations**

- Provide constructive comments and suggestions for improving the manuscripts presented

## **Editors**

- Edit the manuscripts assigned to them

## **Detailed responsibilities**

### **Before the presentation of the first draft**

- Review the written manuscript before the presentation by the author
- Look for gaps, missing information and analysis of the article

### **During presentation of drafts**

- Attend the presentation of the manuscript by the author
- Take note of comments made during the session
- Provide additional comments if required

### **After presentation of drafts**

- Meet with author to discuss changes and decide who (the editor or author) will revise the draft
- Discuss illustrations to be included and their placement in the draft; provide ideas for artwork to the artist
- Revise the draft (or check the author's revisions)
- Provide the revised manuscript (text and illustrations) to the desktop publishing personnel

### **Throughout writeshop**

- Ensure that all materials (text and illustrations) for each article are complete and correct
- Submit the article to the coordinator at the end of every writeshop day

## **Artists**

- Draw artwork to illustrate assigned manuscripts

### **Detailed responsibilities**

#### **Before the presentation of the first draft**

- Draw sketches in pencil to illustrate the draft, in accordance with guidelines provided by the author and editor (where possible)

#### **During presentation of first draft**

- Attend the presentation of the manuscript by the author
- Take notes of changes required in the artwork
- Listen to the story/issue/problem/changes made by author
- Make changes to the illustration based on author's input

#### **After presentation of drafts**

- Discuss changes or additional illustrations with editor and author
- Draw additional artwork as required
- Revise existing artwork as required
- Finalize artwork for all articles and submit to the author

#### **During presentation of second draft**

- Attend the presentation of the manuscript by the author
- Take notes of changes required in the artwork

## **Photocopier Operator**

- Make photocopies of manuscripts on paper and on overhead transparencies

### **Detailed responsibilities**

- Make sufficient photocopies of draft manuscripts for distribution to all participants and writeshop staff at the appropriate time

- Make other photocopies as required
- Keep track of original filing versus the revised copies in consultation with editor and coordinator

## **Logistics Manager**

- Manage the entire writeshop logistics

### **Detailed responsibilities**

- Ensure that all participants receive invitations, guidelines and other information
- Book workshop room, arrange seating, prepare overhead projector, whiteboard, photocopier, computers, supplies, etc. after consultation with coordinator
- Arrange for accommodation, transport and visas for participants (as needed)
- Manage day-to-day workshop finances
- Ensure that refreshments and food are available on time
- Ensure the requirements of the participants are taken care of
- Discuss with the editor, coordinator, artists, computer team and facilitator on the writeshop requirements and tools which should be put in place at the writeshop

## **Writeshop Facilitators and Recorders**

### **Facilitators**

It is your task to select a recorder, manage and facilitate the conference session, introduce each speaker, ensure that the speaker keeps within his or her allotted time, and moderate the questions and discussions after the presentations. Keep these proceedings lively so that participants stay active/engaged.

### **Time**

Please ensure that your session starts and finishes on time, and that each speaker keeps within his or her allotted time.

- Bring the session to order promptly

- Introduce the speaker briefly. Remind the audience of the speaker's name, the paper title, and the page on which the relevant abstract appears in the conference booklet.
- Tell the speaker how much time he has, and at what time he should stop.
- Tell the speaker when there are five minutes left, two minutes left, and when he must stop.
- Thank the speaker after he has finished and invite applause.

### **Visual aids**

- Ensure that the presentation is loaded into the projector before every session. A computer technician should be on standby to deal with every problem that may arise

### **Helping the speaker**

- Make sure you know how to use the audiovisual equipment (turning projectors on and off, focusing, etc.), so you can help the speaker if necessary.
- If the speaker is talking too softly or too fast, please ask him to talk louder/more slowly. Unless avoidable, pick language translator/s from within the group or make them sit with those who need help with translation.



### **Managing questions**

We suggest that you use the following procedure (though feel free to vary this if you wish).

- If the speaker has taken less than her allotted time, you may invite a small number of questions from the floor. If, however, the speaker has used up all the time available, move promptly on to the next speaker.
- Manage the time to leave half an hour free for questions and discussion before the end of the session. Then invite all the speakers to come to the front of the room and sit facing the audience. Invite questions from the audience to any of the speakers.

- Ask questioners to give their names and home institutions before asking their questions. If they do not speak clearly, repeat their name and summarize the question before inviting the speaker to respond.
- It is best to take questions one at a time and to have the speaker answer the question immediately before asking for the next one. (This is easier for the speaker and audience than inviting, say, three questions in sequence before asking the speaker to answer all three.)
- Ask questioners to keep their questions short and to the point. Feel free to cut off (tactfully) a questioner who is talking too much. Similarly, the speaker's response should also not be too long.

### **Guiding the process**

- Do not allow one person to dominate the question-and-answer period. Try to ensure that everyone has a chance to ask questions, especially women and non-English speakers.
- Try to ensure that each speaker is asked some questions, rather than allowing all questions to be directed to one person.
- In the unlikely event that there are no questions at all, you can jump-start the process by asking one yourself.
- If the discussion focuses on a topic that you feel a large number of the audience is interested in, you can guide the questions by saying "Let's have two or three questions on this topic before we move on", and then make sure that the next few questions indeed are relevant to the topic. (If the next question is not relevant, ask the questioner to wait until later before returning to his question.)
- Try to draw out important lessons from the discussion, for instance by guiding questions along certain lines or summarizing the discussion on a particular issue.
- Try to crystallize issues where consensus has been reached and determine those which require further debate.

### **Winding up**

- If there are many questions to one speaker, or the session is going over time, suggest that the questioners meet with the speaker during the break.
- Questioners can also write their names and questions on slips of paper and pass them to the room manager, who will give them to the speaker. The speaker can then respond to the questioner in writing or during the break. (However, we do not recommend that you use this method of questioning during the session itself, since it eliminates a lot of the interest and spontaneity from the discussion period.)

## Ending the session

- Remind the audience when and where to convene for the next session.
- If included, remind them to visit the poster exhibits
- Thank the audience and speakers.
- Invite applause for the speakers before breaking.

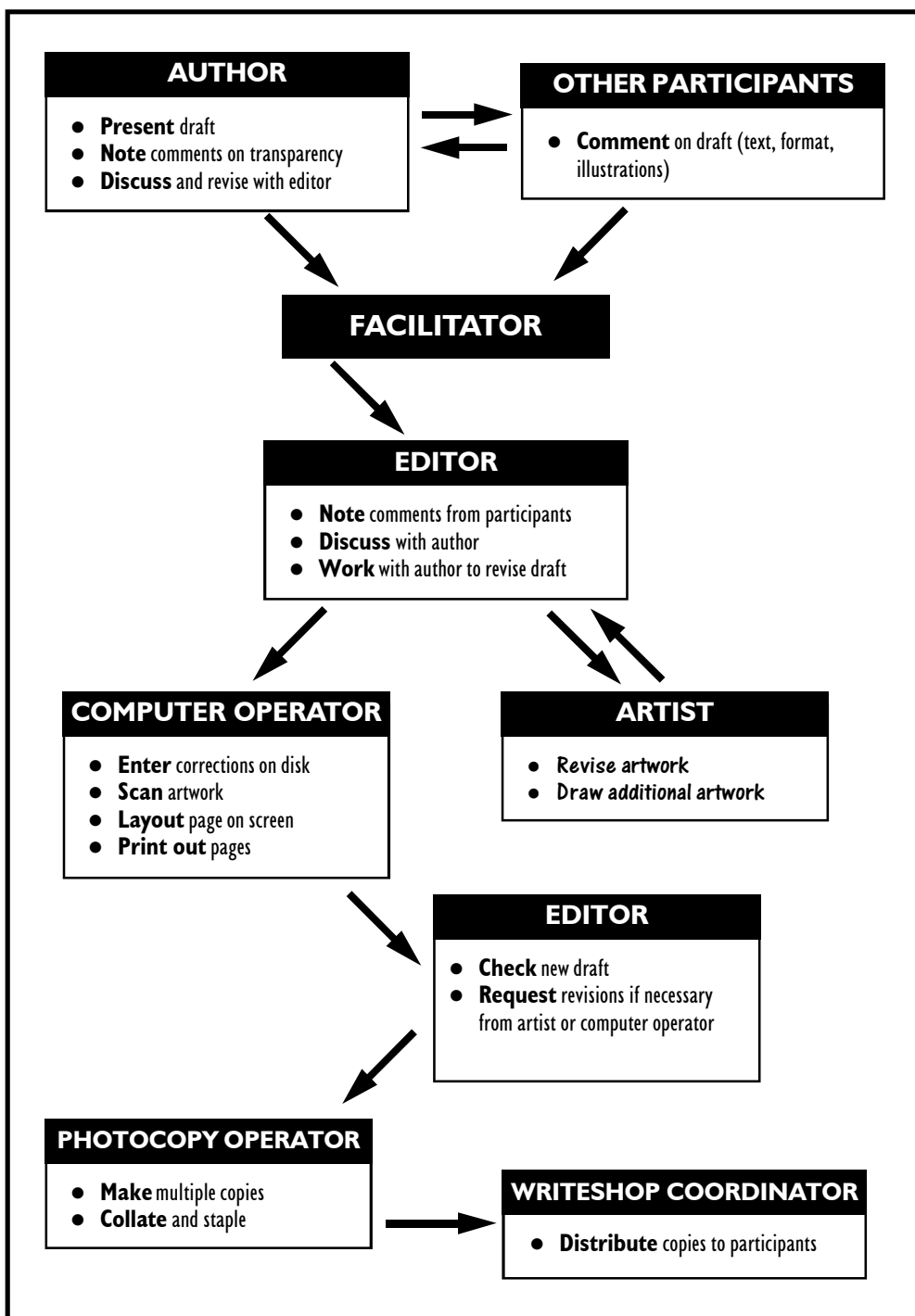
## Production Manager

1. **Have fun**
2. **Check the computers** and other equipment before the writeshop and fix any problems. All computers must run the same version of the same word processing program. They must all be connected to the laser printer (some computers may have the wrong printer drivers etc.)
3. **Set up a computer filing system.** Set up an identical set of directories on each computer so anyone can sit down at any computer and immediately find the file.
4. **Brief the writeshop staff thoroughly** before the writeshop to make sure they understand and can use the filing system, understand the naming conventions, and are familiar with the work flow.
5. **Make frequent backups of files onto disks.** In Kenya we had one of the four computers fatally crash, another floppy drive fail, and another stopped running a key program. Despite all these problems, we lost only one of 106 files — and that was because someone didn't understand the file naming convention.
6. Talking of which, **establish a standard file naming convention**, such as:  
000YYY99.DOC  
where 000 is the file number (eg, 001, 023)  
YYY is the first three letters of the title (eg PIG for pigs)  
99 is the version number (eg 1, 2).
7. Have one person (could be you) responsible for **maintaining the physical files** and allocating file numbers.
8. If you have a scanner, **scan all the pictures** and give them a compatible number (e.g., 023PIG01.TIF) and make sure the artists put this number on the drawing.
9. **Set up a physical filing system.** Get lots of file folders, put the manuscripts in each folder, and keep them up to date. One person should be in charge of this.
10. **Set up a master tracking list** for files, on which you can note and update the status of each file. Don't spend too much time putting this on the computer - it is more important to keep it updated with pencil and keep photocopying it to get a new version.

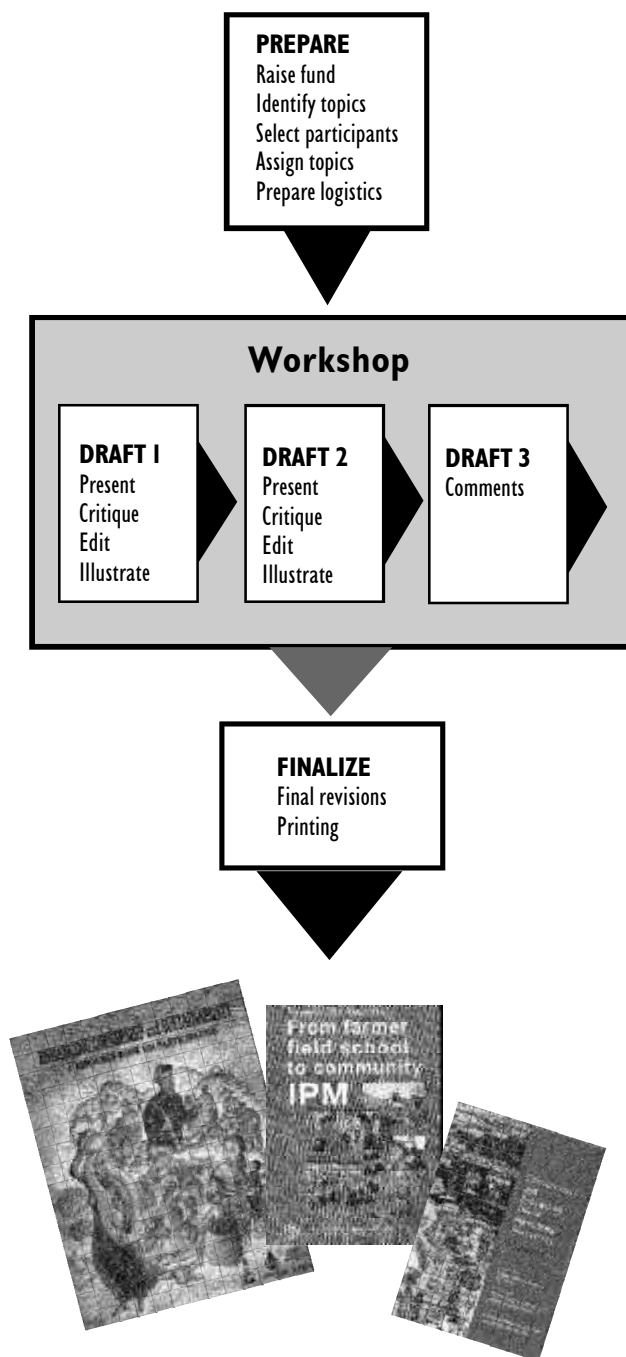
11. **Get the book design nailed down as early as possible.** That way you can avoid changing it halfway through the workshop.
12. **Have regular staff meetings** in the evenings to go through each topic and check its status. These are a pain, but they are absolutely vital. One every two or three days is probably about right.
13. **Be flexible where you can.** For instance, it may not prove possible to desktop publish the materials during the workshop itself. If it is not possible, don't try. It's more important to get the information and artwork complete and accurate than to get them looking pretty (that can be done after the writeshop is over).
14. **Delegate, delegate, delegate.** Do not try to do everything yourself. Your role should be as a manager and coordinator of the materials production, rather than as someone who takes on the brunt of the work. If insufficient staff or equipment have been hired to allow you to get the job done, then either insist on getting more, or scale back the goals (for instance, by not going to DTP.)



# Workflow in a Writeshop



# The Workshop Process: A process flow diagram



# List of Equipment and Supplies

## Computers

No.	Specifications
1	<b>Desktop computer</b> for data manager - acts as server for network. (Word, Excel, PowerPoint, InDesign, graphics software eg Photoshop, scanning software, antivirus software, printer driver)
1	<b>Flatbed scanner</b> - attached to desktop computer
1	<b>Computer network</b> - cables, switch
5	<b>Laptop computers</b> - 1 for each editor (editors should if possible bring their own laptops), 1 for computer projector (Word, Excel, PowerPoint, antivirus software, printer driver)
4	<b>Desktop computers</b> (in case participants do not bring their own)
1	<b>Computer projector</b>
1	<b>Laser printer</b> black/white, connected to network, printer software (CD-ROM)
2	<b>Uninterruptible power supply</b> (if required) and voltage stabilizers (sufficient wattage to support all computer equipment)
5	<b>USB sticks</b> - 1 for each editor, 1 for data manager
10	<b>Writable CD-ROMs</b>
1 cartridge	<b>Laser printer toner</b>
	<b>Paper for printing</b> (see photocopying)

## Photocopying equipment and supplies

No.	Equipment
1 50 reams	Heavy-duty plain-paper photocopier. Good quality of copies is vital. Photocopy paper (1 ream = 500 sheets; 50 x 500 sheets = 25,000 sheets)

## Other equipment and supplies

No.	Equipment, supplies
1	Public address system (desk microphones, lapel microphone, amplifier, speakers)
1	Projection screen
2	Whiteboards and markers
4	Tables for artists, editors, computers (1 each)
1	Electrical extension cords with multiple outlets for projectors, photocopier and computers
1	Table for displays, etc.
2	Chairs and tables for participants
5	Notice boards or display easels
5	Staplers, staples
5 boxes	Paperclips
2	Tacky glue sticks
3	Highlighter markers
40	File folders
1 dozen	Pencils
5 pads	Small Post-It notes
2 sets	Marker pens
4 pads	Large Manila paper or newsprint
2 boxes	Thumbtacks or map pins
4 rolls	Masking tape
	Computer and projector
	USB sticks

# Information Resources

## Writing for a Change

### **An Interactive Guide to Effective Writing, Writing for Science, and Writing for Advocacy**

In *Writing for Change*, you will learn the core skills of effective writing, how to write for scientific publication, and how to write for advocacy. *Writing for Change* will enhance your capacity to write in ways that promote action from your target audience. It is full of practical exercises and examples from the field of international development. A resource centre contains training materials and links to many useful websites. Site maps and a printed users' guide make it simple to follow. *Writing for Change* will prove useful to researchers, campaigners, scientists, fundraisers, project managers, social activists, and especially trainers in writing and communication skills. (Reference: [http://www.idrc.ca/en/ev-9428-201-1-DO\\_TOPIC.htm](http://www.idrc.ca/en/ev-9428-201-1-DO_TOPIC.htm))

### **Writing for Change in Fahamu Site**

Writing for Change is full of practical examples and exercises that you can apply to your own working experience. Writing for change contains examples from the field of international development and practical exercises that can be used by people who train writers. A resource centre contains training materials and links to related websites. Site maps and a printed users' guide make it easy to follow. (Reference: FAHAMU SITE <http://fahamubooks.org/book/?GCOI=90638100580060&fa=complements>)

## **Just Write: A Course on Effective Writing**

This course aims to develop participants' writing skills to support their advocacy work. It delivers a comprehensive approach to the skills of effective writing. It is particularly aimed at people who find writing a chore, who have something

important to say but cannot express it clearly, or who just want some help in polishing their writing skills. It will be of particular interest to anybody planning to produce a research report, thesis, book or book chapter, advocacy document, paper for publication, essay - or any other substantial piece of written work.

(Reference: <http://fahamubooks.org/book/?GCOI=90638100150670&fa=complements>)

## **Toolkit for Researchers**

The Communication Division is providing these tools to help employees at IDRC as well as our partners better achieve their communication objectives. This toolkit for Researchers includes 7 modules:

- How to Become a Strategic Communicator
- How to Build a Slide Presentation
- How to deal with the Media
- How to Do a TV Interview
- How to Make Effective Presentations
- How to Write a Policy Brief
- How to Write for the Web

(Reference: [http://www.idrc.ca/en/ev-131735-201-1-DO\\_TOPIC.html](http://www.idrc.ca/en/ev-131735-201-1-DO_TOPIC.html).)

## **Research Matters Knowledge Translation Toolkit**

What is Knowledge Translation? Known by a host of names, knowledge translation (KT) is such a tangle of actors, ideas and approaches as to defy a single definition. There are academic explanations of KT, there is KT in action, to some it means communications, to others linkage and exchange. Reduced to its essence, though, KT is the middle, meeting ground between two fundamentally different processes: those of research and those of action. KT works, above all, to knit these two processes together. An intensely social process, KT depends upon relationships. With no golden formula for decision-making — where every policy weighs up all the evidence and arrives at the best, most rational solution — KT relies upon vibrant partnerships, collaborations and, above all, personal contact between researchers and research-users. In connecting the purity of science with the pragmatism of policy, the intangibles of trust, rapport and even friendship can be more potent than logic and more compelling than evidence.

(Reference: [http://www.idrc.ca/en/ev-128908-201-1-DO\\_TOPIC.html](http://www.idrc.ca/en/ev-128908-201-1-DO_TOPIC.html))

## **Popularize, Produce, Disseminate! Reference Sheets for Field Researchers**

These sheets are the first installment in the development of a multimedia toolbox designed to help researchers who have no training in communications — particularly in the production aspect — become more effective in disseminating their research. Fourteen (14) reference sheets deal with various communication processes and provide tools that can be used in the field. There is a lot of room for improvement in these sheets, and your input is strongly encouraged.

- Introduction: The role of communication in research projects 2006-10-01
- Developing a Communications Strategy 2006-10-01
- The Production Process 2006-10-01
- Working with Partners 2006-10-01
- The Validation Process: Pre-testing 2006-10-01
- Mass Media 2006-10-01
- Scientific Popularization 2006-10-01
- Using Images: Photographs and Illustrations 2006-10-01
- Leaflets 2006-10-01
- Pamphlets 2006-10-01
- Newsletters 2006-10-01
- Theatre 2006-10-01
- Radio 2006-10-01
- Video 2006-10-01
- Internet 2006-10-01

*(Reference: Popularize, Produce, Disseminate! Reference Sheets for Field Researchers  
[http://www.idrc.ca/en/ev-104545-201-1-DO\\_TOPIC.html](http://www.idrc.ca/en/ev-104545-201-1-DO_TOPIC.html) -- in English and French)*

# Acronyms Used

<b>AB</b>	- Advisory Board
<b>AICC</b>	- Agriculture Information and Communication Centre
<b>CAPRI</b>	- Collaborative Actions and Property Rights
<b>CARE-ICDP</b>	- International Child Development Programme
<b>CBNRM</b>	- Community- Based Natural Resources Management
<b>CIP-UPWARD</b>	- International Potato Center - Users' Perspective with Agricultural Research and Development
<b>CSW</b>	- Complete Staff Work
<b>CTA</b>	- Technical Centre for Agricultural and Rural Cooperation
<b>ELD</b>	- Endogenous Livestock Development
<b>EMG</b>	- Environmental Monitoring Group
<b>FAO</b>	- Food and Agriculture Organizations
<b>HIV/AIDS</b>	- Human Immunodeficiency Virus/ Acquired Immune Deficiency Syndrome or Acquired Immunodeficiency Syndrome
<b>IDRC</b>	- International Development Research Center
<b>IDRC-CIDA</b>	- International Development Research Center/ Canadian International Development Agency
<b>IFAD</b>	- International Fund for Agricultural Development
<b>IIRR</b>	- International Institute of Rural Reconstruction
<b>ISBN</b>	- International Standard Book Number
<b>KM</b>	- Knowledge Management
<b>LIFE</b>	- Local Livestock for Empowerment
<b>LPP</b>	- League for Pastoral Peoples
<b>NGO</b>	- Non- Governmental Organizations
<b>PM</b>	- Prime Minister
<b>SC</b>	- Steering Committee
<b>TSF</b>	- Technical Support Facilities
<b>VCR</b>	- Video Cassette Recording
<b>WG</b>	- Working Group
<b>WISP</b>	- World Initiative for Sustainable Pastoralism



# Writeshops

In recent years, development practitioners and organizations have come to discover and recognize the writeshop as an effective methodology for the documentation and distillation of project learning. A writeshop is a participatory and highly intensive process which involves bringing together authors, editors, artists, and desktop publishing specialists to produce a publication in a relatively short time. Writeshops are characterized by critical reviews and revisions, involving peers and a diverse range of stakeholders and users. Writeshops have been found particularly useful in helping field workers and practitioners document their experiences, making field-based evidence more widely available.

## A writeshop is...

1. Suitable for documenting or transforming knowledge which otherwise might be under-used.
2. Relevant and suitable when producing materials for a large number of people.
3. Results in illustrated materials that present relevant, practical information in simple language.
4. A platform for producing materials in a very short time, sometimes within a few days, often by the end of the writeshop itself.
5. Is a highly participatory process: right from identifying the scope of the publication to evaluating its effectiveness.
6. A venue to bring together different groups – scientists, extension personnel, NGO staff, policymakers, farmers – to develop and produce a common set of materials, where participants benefit from the discussions and networking.
7. A process that enables comments and revisions from other participants. Several authors can contribute to each section of the materials.
8. An effort to produce “stand-alone” information sheets – materials which can be read independently of each other.
9. Is a forum for cross-validation, updating and synthesizing of experiences around specific issues.
10. Very intensive. The time is sometimes insufficient, and the process places a high demand on the abilities of the editors and other staff.
11. An expensive process and it implies a considerable commitment from the organizers – as the timeframe can change frequently.
12. An opportunity to bring together donors and agencies that otherwise might work somewhat independently of each other.
13. A process where the free sharing of knowledge is emphasized.

## About the partners in the writeshop review

### **Knowledge Networking for Rural Development in Asia-Pacific (ENRAP)**

ENRAP is a joint initiative of the International Fund for Agricultural Development (IFAD) and Canada's International Development Research Centre promoting networking for increased knowledge exchange and improved rural knowledge systems to support poverty alleviation. Towards this, ENRAP has supported the use of writeshops as a method of documentation of rural development efforts by IFAD projects and partners in Asia . ([www.enrap.org](http://www.enrap.org))

### **International Development Research Centre (IDRC)**

IDRC is a public corporation created by the Parliament of Canada in 1970 to help developing countries use science and technology to find practical, long-term solutions to the social, economic, and environmental problems they face. Support is directed toward developing an indigenous research capacity to sustain policies and technologies that developing countries need to build healthier, more equitable, and more prosperous societies. ([www.idrc.ca](http://www.idrc.ca))

### **International Fund for Agricultural Development (IFAD)**

IFAD is a specialised agency of the United Nations that was established in 1977 as an international financial institution. IFAD's goal is to empower poor rural women and men in developing countries to achieve higher incomes and improved food security. Since its inception, IFAD has financed over 550 projects in 115 countries, the main focus of which has been the improvement in productivity of on- and off-farm activities. ([www.ifad.org](http://www.ifad.org))

**The Canadian International Development Agency(CIDA)** is Canada's lead agency for development assistance. CIDA aims to manage Canada's support and resources effectively and accountably to achieve meaningful, sustainable results and; engage in policy development in Canada and internationally, enabling Canada's effort to realize its development objectives. ([www.acdi-cida.gc.ca](http://www.acdi-cida.gc.ca))

### **Users' Perspectives With Agricultural Research and Development (UPWARD)**

UPWARD is an Asian network of scientists and development specialists working to increase participation by farmers and other users of agricultural technology in research and development. UPWARD seeks to link users and R&D professionals for more effective agricultural innovation; bring sustained benefits to less favored farming areas and marginalized groups, especially women; and work with households and local communities as key actors in research and learning activities. As a Partnership Program of the International Potato Centre (CIP), it serves as platform for adapting and scaling up innovations for sustainable rootcrop livelihoods. ([www.cip-upward.org](http://www.cip-upward.org))

**The International Institute of Rural Reconstruction(IIRR)** has over 80 years of history in participatory, integrated and people-centered development. IIRR enables people and their communities to effect meaningful change in their lives through action research and learning processes and generating and acquiring knowledge about participatory human development derived from practical experience and learning. The Institute has a long history of documenting and disseminating field-based experience through its publications. ([www.iirr.org](http://www.iirr.org))

**This publication is an output of the workshop organized in the Philippines, July 2010, to review and document the experiences of practitioners who use writeshops to document field experiences and translate research results to enhance their utilization.**

**There are three volumes in the series:**

- 1. Workshop Proceedings**
- 2. Case Studies**
- 3. Guidelines**

**The three volumes can be viewed as complementary products of the review effort though each may be read independently of each other.**

**This document presents guidelines for doing writeshops. The emphasis is on the standard approaches to doing writeshops. Specific guidelines and relevant templates for planning writeshops are provided. In addition, guidelines for doing writeshops for products such as policy briefs and textbooks are included.**

**This publication reports on a workshop sponsored by:**



**Enabling poor rural people  
to overcome poverty**