Engagement Plan:

Technical Reporting 2025

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# Background

Effective communication and engagement with CGIAR's Programs and Accelerators (P/As) and Centers (on W3/bilateral projects mapped to P/As) is essential for ensuring a smooth and efficient 2025 Technical Reporting process.

Lessons from previous reporting cycles have highlighted the importance of timely, clear, and responsive support to reporting teams.

Building on the progress made in recent years, this document outlines a plan to further streamline and optimize communication and engagement mechanisms for the 2025 reporting cycle.

# Objective

The objective of this document is to set out a clear support and communication plan to **guide interactions between PPU/PCU, CGIAR P/As and Centers’ delegates to P/As**.

This plan pertains to the 2025 Technical Reporting cycle, with the support period running from July 2025 to June 2026.

This engagement plan is a living document and may evolve over the course of the reporting cycle. It will be periodically revisited to ensure it remains relevant and effective.

# Communication channels with Programs and Accelerators

## A single location for all documents and resources

The [Performance and Results (P&R) Hub](http://performance.cgiar.org/) will serve as the central repository for all materials related to Technical Reporting. This includes timelines, guidance documents, templates, updates, frequently asked questions (FAQs), and other relevant resources to support Programs and Accelerators throughout the reporting cycle.

The Hub is structured around key phases of the reporting process, with dedicated pages for **planning**, **reporting**, and **reflect/re-planning**, making it easier for users to find what they need at each stage.

The content and structure of the P&R Hub have been reviewed and updated based on:

* Changes to the Technical Reporting process
* Evolving information needs of Programs and Accelerators
* Feedback gathered during previous reporting cycles

Users are encouraged to regularly consult the P&R Hub as the authoritative source for the latest guidance and reporting support materials.

## Targeted engagement with Program and Accelerator representatives

To strengthen the relevance and usability of Technical Reporting updates, targeted outreach will be conducted via email to specific categories of contributors within the P/As. These targeted communications will align with ongoing revisions and developments in the Technical Reporting process, allowing for timely, focused feedback from those directly involved.

Key elements of this engagement approach include:

* Sending tailored emails to relevant P/A representatives based on their role or involvement in specific aspects of Technical Reporting.
* Requesting input on proposed changes, new tools, or guidance materials to ensure they reflect practical needs and constraints.
* Copying Program Coordinators on all targeted messages to maintain transparency and alignment.

This approach is designed to foster meaningful two-way communication and ensure that revisions to the Technical Reporting process are grounded in operational realities across P/As.

## Streamlined communication

To avoid multiple information channels, and to provide clarity on messaging, the following will be implemented:

### Microsoft Teams chats

Microsoft Teams chats will be activated only during scheduled meetings and closed immediately after. Meetings will be recorded and posted on the P&R Hub. Once a meeting is finished, the chat will be closed and no longer monitored for comments/questions.

Programs and Accelerators may continue using Microsoft Teams for their internal collaboration. However, this will not serve as the official channel for Technical Reporting updates or communication from PPU/PCU.

*\*Note that PCU has a Teams channel with the Program Coordinators for quick questions and reminders.*

### Technical Reporting questions

All questions and comments on Technical Reporting should be sent via email to [performanceandresults@cgiar.org](mailto:performanceandresults@cgiar.org). For **technical** questions related to using the PRMS Reporting Tool, emails should be sent to [prmstechsupport@cgiar.org](mailto:prmstechsupport@cgiar.org).

PPU/PCU will endeavor to reply to queries as soon as possible; please note that delays are usually due to ensuring that responses have been reviewed and align with the latest updates and guidance. Responses will also be posted in real time on the P&R Hub for wider reference.

### Fortnightly update emails

To ensure transparent and regular communication throughout the reporting cycle, a centralized update mechanism will be used.

Emails from [performanceandresults@cgiar.org](mailto:performanceandresults@cgiar.org) will be the official channel of communication from PPU/PCU for Technical Reporting updates and information.

PPU/PCU will send a fortnightly email from [performanceandresults@cgiar.org](mailto:performanceandresults@cgiar.org) to provide a summary of any updates or questions/discussions that are relevant from the previous two weeks.

The fortnightly update email will be sent to:

* Program/Accelerator Program Coordinators
* Program/Accelerator MELIA Focal Points
* Program/Accelerator Communications Focal Points
* Program/Accelerator Center Delegates + MELIA from Centers
* AoW leads/co-leads
* CGSpace Team
* Lead KM Managers
* Curators/Repository Managers
* PRMS Team
* PCU Team
* PPU Team

Additional emails will be sent out from this email address with any time-sensitive information.

### Info-sessions

A limited number of targeted info-sessions will be held to provide focused guidance on key aspects of the 2025 Technical Reporting process, and will be timed to align with critical points in the reporting timeline. Each session will include a short presentation followed by time for questions and discussion. Invitations and materials will be circulated in advance, and recordings will be made available for those unable to attend live.

### Monthly drop-ins

To provide ongoing, accessible support throughout the reporting period, monthly drop-in sessions will be held via Microsoft Teams. These informal sessions will offer Programs and Accelerators the opportunity to raise questions, seek clarification, and engage directly with PPU/PCU. No formal presentations will be given; instead, the focus will be on open dialogue and timely support. Invitations and calendar holds will be shared in advance, with reminders included in the regular update emails.

### PRMS enhancements and feedback process

The PRMS Reporting Tool is continuously improved in response to user needs and feedback. The update process follows these steps:



The Sounding Board will consist of representatives from:

* PRMS Team
* PCU Team
* PPU Team
* P/A representatives, depending on what is being tested, availability etc.