INTEGRATION GUIDANCE AND STRATEGIC ALIGNMENT PROPOSAL

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1. EXECUTIVE SUMMARY

This proposal offers practical, flexible guidance for embedding responsibility, equity, and contextual awareness into the CGIAR's innovation and scaling processes. It builds on the findings of the Framework Analysis Report, which examined CGIAR instruments against globally recognized dimensions of responsible innovation and principles of responsible scaling, and on extensive stakeholder consultations that identified both promising entry points and persistent gaps, particularly in reflexivity, legitimacy, and attention to power, that must be addressed for the CGIAR to realize its responsible innovation and scaling ambitions fully.

Rather than introducing new frameworks or burdensome requirements, the guidance builds on existing CGIAR instruments and draws from globally recognized frameworks and optional "tag-in" tools. These include the EU Responsible Research and Innovation (RRI) Framework, Transformative Innovation Policy (TIP), IDRC's Scaling Science, Wageningen University and Research's reflexivity and responsible scaling work, GIZ's Theory of Scaling, the Global Resilience Partnership's Adaptive Scaling, the Scaling Community of Practice's Fundamentals and Mainstreaming tools, the OECD DAC scaling guidance, and CSIRO's Mission-Oriented and Responsible Innovation Ecosystems. Optional tools such as the Multidimensional Digital Inclusiveness Index (MDII), the Gender Action Learning System (GALS), Gender Equality and Social Inclusion (GESI) markers, and Human-Centered Design (HCD) can further strengthen inclusion, accountability, and contextual relevance in specific settings.

The approach is intentionally modular, offering three integration pathways; quick-start, light-touch, and deep-dive; so that Programs and Initiatives can engage at a level that fits their capacity, priorities, and influence over processes. Menus of prompts for the six dimensions of responsible innovation (Anticipation, Inclusion, Reflexivity, Responsiveness, Legitimacy, Knowledge) and four principles of responsible scaling (Social Differentiation, Power and Inclusion, Institutional Fit, Adaptive Learning) provide a core practical resource. **Annex D** gives instrument-specific entry points for IPM, IPSR, GenderUp, the Scaling Scan, and the Six-Step Approach, making it easier for teams to adapt prompts to their existing workflows.

Consultations reinforced the need for usable, low-barrier options that fit real-world workflows, avoid duplication, and can be adapted to different contexts. Light-touch adaptation guidance (**Section 5**) shows how prompts can be integrated into existing planning, reflection, and reporting processes, while piloting considerations (**Section 6**) outline how teams can trial and refine the approach through voluntary pilots or informal feedback loops.

By combining structured yet adaptable menus, clear integration pathways, and a focus on usability, this proposal responds directly to stakeholder calls for practical, low-burden support. With sustained leadership backing, peer learning, and ongoing iteration, the CGIAR can mainstream responsible innovation and scaling in ways that reinforce quality, credibility, inclusivity, and long-term impact while avoiding unnecessary burdens or duplication of effort.

This document is aimed at CGIAR Program teams, MEL professionals, and system-level actors seeking practical ways to strengthen equity and responsibility in innovation and scaling. The guidance is designed to support integration in a practical, iterative manner, enabling CGIAR Program teams to strengthen responsibility and equity in innovation and scaling without requiring major structural changes. Uptake at scale also depends on institutional and leadership support, which is addressed in a separate Implementation Report focused on adoption scenarios, rollout options, and capacity needs.

2. BUILDING ON THE FRAMEWORK ANALYSIS REPORT

2.1 Gaps Identified in CGIAR's Current Approaches

The Framework Analysis Report examined a range of CGIAR instruments (institutional frameworks, methodologies, and operational tools) against globally recognized dimensions of responsible innovation and principles of responsible scaling. This analysis identified several promising entry points but also highlighted key gaps that need to be addressed if CGIAR is to fully embed inclusion, equity, and learning into the design and delivery of innovations[1].

While there is strong intent across CGIAR to innovate responsibly and scale impact inclusively, current approaches vary in how explicitly they address core dimensions such as reflexivity and legitimacy, and principles such as power and inclusion. These gaps are not due to a lack of will; rather, they reflect the practical constraints facing teams, from limited budgets, capacities, and bandwidth, to the absence of specific prompts or processes that would enable more systematic integration of these dimensions and principles.

Three cross-cutting gaps stand out:

- **Limited reflexivity**. While some elements of reflection and learning are present, for example, through 'Pause and Reflect' in the TRA or adaptation prompts in IPM, there is limited space for structured reflection on the assumptions, values, and trade-offs embedded in innovation choices. Teams rarely have the capacity or the time to ask whether an innovation should be scaled, in addition to how.
- **Weak treatment of legitimacy**. Legitimacy, both in terms of who is involved in defining problems and shaping solutions, and how those decisions are seen as credible by affected communities, is not consistently embedded. There is limited guidance on what constitutes legitimate innovation processes or how to assess whether scaling efforts are socially and contextually appropriate.
- **Inconsistent attention to power**. Power dynamics, including how decisions are made, whose voices are prioritized, and how benefits and risks are distributed, are not systematically surfaced in current instruments. While some CGIAR instruments refer to stakeholder engagement or inclusivity, few explicitly address the structural power imbalances that shape participation and outcomes.

These gaps are not uniform across all instruments and processes, nor are they static. There is clear momentum within the CGIAR to address these issues, and promising elements exist within several existing frameworks and initiatives. The challenge, and the opportunity, is to build on that foundation with a practical, system-wide approach.

This proposal sets out a pragmatic pathway for strengthening responsible innovation and scaling within the CGIAR. It draws on globally recognized frameworks and tools to offer integration options that are context-sensitive, low-burden, and aligned with ongoing processes and priorities. Rather than prescribing a one-size-fits-all solution, the guidance identifies actionable entry points that can help fill current gaps and move towards a more inclusive, reflexive, and legitimate innovation ecosystem.

[1] While the Framework Analysis did not assess the degree of consensus across the CGIAR on responsible scaling principles, future work could explore whether a shared understanding would help strengthen coherence in applying these principles.

2.2 Purpose of This Proposal

This proposal aims to support and extend the ongoing efforts across the CGIAR to embed responsibility, inclusion, and equity in innovation and scaling processes. The analysis in the Framework Analysis Report highlighted promising foundations already in place, including growing attention to inclusion, adaptive learning, and stakeholder engagement. At the same time, it underscored some areas where teams are seeking more practical support, clearer entry points, and low-burden ways to deepen their work.

Rather than introducing new expectations or creating additional layers, the proposal is designed to offer pragmatic, flexible guidance that can be drawn on as needed, aligned with teams' capacities and contexts. It draws from globally recognized frameworks and tools to help fill specific gaps, such as how to surface power dynamics, foster reflexivity, or assess legitimacy, in ways that can be integrated into existing processes over time.

In doing so, the proposal recognizes:

- That teams are already navigating substantial complexity, with limited resources;
- That interest in more inclusive and responsible innovation is strong, but often constrained by competing demands and tight timelines;
- That integration needs to be incremental, supportive, and led by those closest to the work; and
- That teams will be more likely to apply the guidance if they can see its utility for their work, and if there are incentives or recognition mechanisms that reinforce uptake.

The goal is to help translate ambition into action by identifying practical options that teams can adapt to their specific contexts, building on what already exists, and using the results to inform conversations with partners and donors. Where possible, it also aims to highlight opportunities for alignment, reducing duplication, surfacing synergies, and strengthening coherence across CGIAR's innovation and scaling efforts.

Ultimately, this is not a new framework, but a resource to help deepen and operationalize the inclusive, adaptive, and context-aware practices that many teams are already working hard to implement. What follows is a set of strategic integration pathways that build on these insights. Rather than proposing new CGIAR instruments, the aim is to offer a practical roadmap for deepening inclusion, reflexivity, and legitimacy using approaches already tested in other global contexts. These external frameworks and tools are not intended to replace or override existing CGIAR instruments. Instead, they are presented as complements that can be selectively drawn on to support teams based on their needs, priorities, and available resources. This proposal focuses on operational tools and methodologies in use within the CGIAR. While the Technical Reporting Arrangement (TRA) and Performance and Results Management Framework (PRMF) were reviewed in the Framework Analysis, they are not included in the sample tag-in guidance in **Annex D** because they operate at the system level and are not directly modifiable by innovation teams.

3. STRATEGIC INTEGRATION PATHWAYS

3.1 Key Integration Needs

The Framework Analysis Report identified several cross-cutting needs where additional guidance or support could help strengthen responsible innovation and scaling across CGIAR. These are not new challenges, nor are they unique to CGIAR. Rather, they represent areas where existing ambitions could be more fully realized through targeted integration into current instruments, processes, and practices.

The following integration needs emerged most clearly:

- **More explicit attention to power and social differentiation**

While many CGIAR teams aim to engage a broad set of stakeholders, existing processes do not always create space to explore the structural power dynamics and historical injustices that shape participation, decision-making, and outcomes. Questions of who defines problems, who benefits, and who may be excluded are often implicit rather than explicit. Making power more visible, both in design and in implementation, can help sharpen strategies for inclusive innovation and equitable scaling. GenderUp is one example of a tool that surfaces differential impacts and highlights gendered barriers, but similar prompts could be extended to consider broader aspects of power and social differentiation, including age, ethnicity, and socioeconomic status.

- **Greater focus on institutional fit and context sensitivity**

Instruments and guidance often emphasize technical or outcome-based principles of scaling, with less consistent attention to systems readiness, enabling conditions, or long-term institutionalization. Understanding how formal and informal systems support or constrain uptake is critical to ensuring that scaling efforts are durable, legitimate, and locally owned. The IPM process provides a useful platform for packaging innovations in a way that considers local context, but could benefit from more systematic prompts to examine institutional readiness, alignment with policy frameworks, and the incentives or disincentives faced by delivery partners. Frameworks such as GIZ's Theory of Scaling and the OECD DAC guidance offer practical prompts and systems lenses that could enhance this area.

- **Stronger mechanisms for adaptive learning and reflexivity**

While elements of reflection exist within CGIAR (such as Pause and Reflect sessions), structured processes to revisit assumptions, track unintended effects, or adjust course based on lived realities are not consistently embedded. Teams expressed a need for approaches that allow for reflection not just on progress, but on purpose, encouraging them to ask whether an innovation is still relevant, acceptable, and needed. External approaches from GRP, WUR, and SCoP offer concrete suggestions for adaptive learning, learning sprints, and systems reflexivity that can complement internal practices. Including a small set of simple qualitative or quantitative metrics can also help teams understand whether these practices are being applied effectively and are contributing to more inclusive, context-sensitive outcomes.

- **Clearer framing of legitimacy and ethical considerations**

Legitimacy, meaning how decisions are made and by whom, and whether innovations are seen as credible and appropriate by affected communities, is a recurring concern, but is not well defined or operationalized in current guidance. Similarly, ethical considerations such as risk, harm, consent, and accountability are often absent or only lightly touched on in innovation profiling, packaging, or scaling processes, though they may be addressed elsewhere, for example, through Center-specific ethical approval procedures. Innovation Profile questions under IPSR have begun to include references to engagement and equity, but further development would be needed to support more robust assessment of legitimacy and ethical practice across innovation lifecycles.

Taken together, these areas highlight a need for more deliberate integration of responsibility and inclusion across the innovation and scaling system. Rather than starting from scratch, CGIAR can build on the instruments and practices already in place, supplementing them with external approaches that offer targeted, adaptable support. The next section introduces a set of these frameworks and tools, drawn from global experience, which can help address the identified needs practically and flexibly.

3.2 External Frameworks and Tools That Help Plug Gaps

Several globally recognized frameworks and tools offer practical ways to help fill the integration gaps identified in the CGIAR's current innovation and scaling system. These are not proposed as replacements for the CGIAR's own instruments (methodologies and tools), but as complementary resources that can support and extend what is already in place.

The frameworks and tools outlined below have been selected for their relevance to specific dimensions of responsible innovation and principles of responsible scaling. They offer tested methods for addressing issues such as power dynamics, institutional fit, legitimacy, and adaptive learning, and may be especially useful for teams looking for entry points that align with their capacity and stage of work. The frameworks and tools are presented in the following order: RRI, TIP, IDRC, GIZ, OECD, GRP, SCoP, and CSIRO. This sequence begins with widely recognized conceptual frameworks and principles (RRI, TIP, IDRC), followed by more operational and applied tools for implementation and adaptation (GIZ, GRP, SCoP), and concludes with system-level guidance from funders and institutional science agencies (OECD, CSIRO).

European Union's Responsible Research and Innovation (RRI) Framework

The RRI framework provides normative grounding in the ethical, inclusive, and deliberative dimensions of innovation. Its four pillars of anticipation, inclusion, reflexivity, and responsiveness are already reflected in CGIAR's responsible innovation discussions, but the EU's RRI tools offer additional depth on issues of legitimacy, public accountability, and governance. The RRI Practice Handbook includes organizational maturity assessments, self-reflection tools, and guidance for embedding RRI into institutional systems, resources that could support CGIAR's ambitions to mainstream responsible innovation at both project and program levels. For example, these could be applied by incorporating maturity assessments into program reviews, using self-reflection tools in Pause and Reflect sessions, or adapting governance guidance for use in IPM and IPSR processes.

Transformative Innovation Policy Consortium's Transformative Innovation Policy (TIP) Framework

TIP provides a systems-oriented approach to innovation and scaling, with a strong emphasis on challenge-led missions, inclusion, and reflexive learning. The framework introduces a set of "transformative outcomes" and associated tools that can help teams assess directionality, system reflexivity, and long-term change. This approach is particularly relevant to CGIAR's ambitions to shift from project-based delivery to system-level transformation. It may also support more strategic engagement with policy actors, funders, and innovation ecosystems.

International Development Research Center's Scaling Science Framework

This framework provides a principle-based approach to scaling that is particularly useful for addressing power and inclusion, as well as institutional fit. Its four guiding principles (justification, optimal scale, coordination, and dynamic evaluation) encourage teams to ask not only whether scaling is possible, but also whether it is desirable and for whom. The accompanying Scaling Playbook offers practical tools such as stakeholder mapping, system mapping, and equity-focused prompts that could be adapted for use in IPSR, IPM, or other planning processes.

Wageningen University and Research's Reflexivity Dimensions

Wageningen University and Research's work on reflexive monitoring and responsible scaling provides conceptual and practical foundations for the CGIAR's Responsible Scaling principles. In addition to Reflexive Monitoring in Action (RMA), key contributions include guidance on social differentiation, institutional fit, power, and adaptive learning, principles that underpinned the Framework Analysis. This work has been instrumental in shifting perspectives from linear "scaling up" models toward more context-aware, equity-oriented approaches. Its emphasis on monitoring reflexivity and learning within complex systems supports adaptation and inclusion across innovation and scaling processes. WUR's contributions are widely cited in the scaling literature, including in work by TIPC, IDRC, and GRP.

GIZ's Theory of Scaling and Scaling Readiness Tools

GIZ's approach to scaling includes practical tools such as the Scalability Self-Check, Theory of Scaling prompts, and Impact Pathway Canvas. These are designed to support analysis of institutional fit, stakeholder roles, and context sensitivity. These tools and their associated principles could help strengthen the IPM process by providing clearer prompts and templates for assessing whether innovations are ready to scale and under what conditions.

GRP's Adaptive Scaling Approach (Global Resilience Partnership)

The Global Resilience Partnership's (GRP) approach to scaling in resilience-building initiatives emphasizes adaptive learning, experimentation, and risk tolerance. Its principles and tools, such as scalability assessments, learning sprints, and resilience incubation, help teams navigate complexity, test assumptions, and iterate on designs. This approach aligns closely with the needs identified in CGIAR for more agile, real-time learning and may be particularly useful in contexts where innovations must evolve in response to emerging data, feedback, or shifting conditions.

Scaling Community of Practice (SCoP) – Mainstreaming Initiative and Fundamentals Framework

The SCoP's frameworks and tools distinguish between transactional and transformational scaling and provide resources to support long-term ownership, institutionalization, and inclusion of local actors. The Mainstreaming Tracking Tool and Scaling Fundamentals highlight the importance of sustained engagement, enabling conditions, and intermediation. These tools could inform CGIAR's strategic discussions around system-level integration of scaling practices and provide funder-facing language and planning structures to support IPSR+ and related system innovations.

OECD DAC Guidance on Scaling Development Outcomes

The OECD DAC guidance offers a comprehensive and funder-facing framework for achieving sustainable, inclusive, and long-term impact at scale. It emphasizes locally led development, optimal rather than maximum scale, and systems practices that account for complexity and uncertainty. Key contributions include defining scaling pathways (public, commercial, and hybrid), highlighting the importance of shared vision and local ownership, and integrating scaling into organizational strategy and decision-making. The guidance also sets out practical considerations for adaptive learning, sustainability, business models, and political economy. For the CGIAR, this offers valuable cross-learning for engaging funders, framing long-term pathways to impact, and embedding scaling in strategy, budgeting, and systems thinking. This OECD guidance was added to the review at the request of the CGIAR Consultancy Core Team and provides a valuable, funder-facing complement to practitioner-focused tools.

Commonwealth Scientific and Industrial Research Organization's Mission-Oriented and Responsible Innovation Ecosystems (MARIEs)

CSIRO, Australia's national science agency, has developed an applied model of Responsible Innovation (RI) grounded in practice across sectors like agriculture, digital technology, and climate services. Its approach embeds RI as a scientific capability through interdisciplinary teams and programs such as the Responsible Innovation Future Science Platform (RI FSP). It frames RI as essential to anticipating and managing the societal, ethical, and environmental consequences of emerging science and technology. In parallel, CSIRO's Mission-Oriented Innovation (MOI) agenda tackles grand challenges such as drought resilience through collaborative, cross-sector efforts. These two strands converge in Mission-oriented and Responsible Innovation Ecosystems (MARIEs), a framework that integrates responsibility into the strategy, programming, and implementation of innovation missions; multi-actor, multi-disciplinary, and impact-driven initiatives, broadly analogous to the CGIAR's Impact Areas and Programs.

Optional "Tag-In Tools for Context-Specific Needs

Several domain- or modality-specific tools and approaches were mentioned in consultations with CGIAR staff. Although these were outside the original TOR and thus not included in the core framework analysis, they may offer valuable support in particular contexts. They can be considered optional "tag-in" tools to complement responsible innovation and scaling efforts in specific thematic or methodological areas:

- **The Multidimensional Digital Inclusiveness Index (MDII)**, developed under the CGIAR Digital Innovation Initiative, assesses how inclusive digital tools are for underserved users. MDII indicators span accessibility, governance, usability, and social impact, and have been piloted across the Food and Agriculture Organization of the United Nations' Water Productivity Open-access Portal (WaPOR), IRRI's Rice Crop Manager, and Farmerline in Ghana. MDII aligns especially well with the inclusion, legitimacy, and responsiveness dimensions of responsible innovation.
- **The Gender Action Learning System (GALS)**, used in the CGIAR and elsewhere to support participatory, visual, and gender-transformative approaches to innovation and livelihood planning. GALS methods may support inclusion, reflexivity, and co-creation within innovation packaging or IPSR+.
- **Gender Equality and Social Inclusion (GESI)** markers or checklists, used by various CGIAR Initiatives, which provide structured prompts on equity, intersectionality, and inclusion in design and delivery. Practical approaches from recent CGIAR programs include the Food Systems Accelerator's GESI technical assistance, which applied the framework to develop action plans, assess business models, and identify targeted interventions for women, youth, and marginalized groups.
- **Human-Centered Design (HCD)**, widely used in digital and product development, and increasingly cited in CGIAR, offers guidance on iterative co-design with users. HCD supports the responsible innovation dimensions of inclusion, legitimacy, and reflexivity, especially when paired with participatory research or living lab approaches.

These tools may be particularly relevant for:

- Digital innovations (MDII, HCD);
- Gender and inclusion-focused programs (GALS, GESI);
- Initiatives seeking participatory or co-creative design.

They are not intended to replace core CGIAR instruments but can be integrated selectively where appropriate to strengthen inclusion, accountability, and contextual relevance. Detailed integration guidance for the CGIAR instruments IPM, IPSR, GenderUp, the Scaling Scan, and the Six-Step Approach, including how to adapt or 'tag-in' optional tools such as MDII, GALS, GESI, and HCD, is given in **Annex D**.

To support mainstreaming across the CGIAR, these tools can be introduced through different levels of integration, depending on a team's strategic priorities, available resources, and stage in the program cycle. The three pathways outlined in **Section 3.3**, quick-start, light-touch, and deep-dive, offer options for tailoring uptake. **Annex D** provides further guidance on how each CGIAR instrument can draw on these tools without duplicating existing efforts or overburdening workflows. Selection of a pathway or combination of pathways should consider factors such as decision-making authority, reporting requirements, and alignment with ongoing resource allocation processes to ensure ownership, sustainability, and coherence with current systems.

3.3 Suggested Combinations or Sequences

Building on the frameworks, tools and integration needs described above, this section offers three practical pathways to support responsible innovation and scaling across the CGIAR. These options are not intended as a rigid sequence, but as flexible choices depending on a team's capacity, control over processes, and program-level ambitions. Each pathway draws on frameworks and tools that are already in use globally and can be tailored to fit within CGIAR's evolving systems and processes. By presenting a menu of options, from quick-start actions requiring no formal approval to more structured integration efforts to deep-dive program-level approaches, this guidance aims to support teams wherever they are starting from. Examples of how these options apply to specific CGIAR methodologies and tools are provided in **Annex D**. The goal is not to prescribe a single model, but to help programs and partners identify entry points that align with their needs and ambitions.

Option 1: Quick-start entry points (no senior approval required)

These options are suited to teams that want to begin immediately and have autonomy over project-level planning, MEL, or innovation management tools. They are actions that can be taken at the team or project level, without requiring changes to CGIAR-wide processes or frameworks. They are well-suited to contexts where teams want to start integrating responsible innovation dimensions and scaling principles with minimal disruption or additional investment. To avoid overcomplication, teams may wish to select one or two quick-start actions from **Annex D** that best fit their immediate priorities.

- Use GenderUp or similar tools already in circulation to flag differentiated impacts across gender, age, or other factors, then apply IDRC's framing questions (e.g. "Who benefits? Who might be excluded?") to guide discussion.
- Introduce short reflection prompts from WUR's reflexivity dimensions into MEL planning or Pause and Reflect sessions, using existing meeting structures.
- Use GRP's learning sprint model as a format for internal learning reviews, particularly in innovation pilots or scaling experiments.
- Apply basic prompts from the OECD DAC guidance or SCoP's scaling tracker to help teams reflect on ownership, handoff, or sustainability early in the process.

Option 2: Light-touch integration into mainstream processes

This approach is most appropriate for teams that are already using core CGIAR methodologies like IPSR or IPM and are in a position to shape how tools are applied, updated, or interpreted. This level of integration builds on existing processes (e.g. IPSR, IPM, reporting templates) and may require light adaptation of tools, but does not involve wholesale redesign or institutional reform.

- Embed selected IDRC Scaling Science principles into the IPSR checklist or planning templates, particularly the idea of optimal scale and stakeholder coordination.

- Add a “legitimacy and ethics” prompt, drawing from the EU RRI Handbook, into Innovation Profile guidance to encourage teams to consider social acceptability and ethical trade-offs.
- Incorporate GIZ’s institutional fit prompts into IPM reviews or innovation packaging workflows to support better contextualization and stakeholder mapping.
- Use CSIRO’s MARIE framework as a reference when adapting program strategies or identifying multi-stakeholder engagement gaps in mission-style CGIAR initiatives.
- Test simple scoring or reflection tools from the SCoP Mainstreaming Tracker or OECD DAC guidance to assess scaling-readiness across delivery, MEL, and finance functions.

These changes would benefit from coordination with relevant working groups (e.g. IPSR+, MELCOP), but could be rolled out incrementally.

Option 3: Deep-dive integration for programs with dedicated interest and resources
This option fits programs or leadership teams with a mandate or desire to lead on responsible innovation and scaling, and who can invest in more structured, system-wide approaches through deeper engagement with external frameworks and tools.

- Apply the full Transformative Innovation Policy (TIP) framework to design and evaluate challenge-led missions, drawing on tools like the Transformative Outcomes checklist and mission-framing guides.
- Use the Scaling Community of Practice’s Mainstreaming Tracker to assess scaling-readiness and long-term institutionalization across program activities, funding models, and partnerships.
- Pilot a modified IPSR+ package that layers reflexive monitoring (WUR), IDRC’s scaling prompts, and GRP’s adaptive learning cycles to generate a more coherent, inclusive, and accountable scaling process.
- Where possible, align these efforts with funder-facing tools such as the OECD DAC scaling guidance to inform proposal framing, reporting, and resource mobilization.

These options will likely require targeted investment, senior-level buy-in, and alignment with portfolio-level learning and strategy efforts, but they offer the most potential for systemic change. Where relevant, deep-dive integration can be linked to existing CGIAR reporting processes, such as annual performance reports or IPSR updates, to ensure that learning and outcomes are captured consistently and inform decision-making at the program and system levels.

4. INTEGRATION MENUS AND PROMPTS

This section provides practical guidance to help CGIAR teams integrate responsible innovation and scaling into their daily work. It is structured around ten core elements drawn from the Framework Analysis Report: six dimensions of Responsible Innovation, and four principles of Responsible Scaling. These elements represent the key attributes of innovation and scaling processes that are ethically sound, context-sensitive, inclusive, and oriented toward long-term impact.

The first part of the section focuses on the Responsible Innovation dimensions: Anticipation, Inclusion, Reflexivity, Responsiveness, Legitimacy, and Knowledge. These reflect the EU Responsible Research and Innovation (RRI) framework with further elaboration by Wageningen University and Research and CSIRO. The second part introduces the four Responsible Scaling principles, namely Social Differentiation, Power and Inclusion, Institutional Fit, and Adaptive Learning, based on work by WUR, IDRC, GRP, and others.

For each element, an outline is given of what CGIAR instruments already do, what is currently missing, suggested prompts or tools from the global frameworks described in **Section 3** and **Annex A**, and examples of where and how these could be applied. Each subsection also includes a summary table for quick reference and use in tool adaptation or team discussions. To support easy reference, **Annex D** provides a summary of suggested prompts and entry points for IPM, IPSR, GenderUp, the Scaling Scan, and the Six-Step Approach. This includes an informal checklist of possible adaptations across planning, implementation, and reporting. While no prompts are mandatory, the options are structured to show where integration can happen with minimal disruption (optional) versus where stronger alignment may be needed for system-level consistency. Teams can select what best fits their stage in the process and level of ambition.

4.1 Anticipation

What the CGIAR instruments already do:

Some aspects of anticipation are embedded within PRMF and IPSR processes, particularly through early-stage questions about innovation purpose, goals, and potential impacts. IPSR guidance encourages teams to define the challenge an innovation seeks to address and to identify relevant users. TRA similarly prompts teams to clarify assumptions and scaling pathways at the start of project design.

What is missing:

There is limited structured support for systematic foresight, scenario thinking, or anticipation of indirect or unintended consequences. Current prompts often emphasize intended benefits but do not always include mechanisms for surfacing risks, trade-offs, or uncertainties. Ethical concerns, long-term implications, or shifts in power dynamics may be underexplored. In addition, CGIAR teams noted a desire for tools that enable foresight without requiring specialized forecasting expertise.

Suggested prompts and tools from external sources:

- EU RRI Practice Handbook: Foresight and scenario prompts such as “What are the broader consequences if this innovation becomes mainstream?” Or, “What risks might emerge if uptake occurs unevenly?”
- TIPC’s Transformative Outcomes: Encourages directionality and long-term systems change thinking; includes mission framing tools and anticipation prompts for innovation labs and research councils.
- CSIRO MARIE: Offers responsible prediction models, scenario-based planning, and stakeholder mapping tools designed to identify downstream implications and social risks.

- IDRC Scaling Science: Introduces principles of justification and optimal scale principles, with questions like "Why scale now?" Or, "What unintended effects might emerge at scale?"

Examples of where/how to apply:
- During the IPSR design stage, teams could add an optional scenario-based prompt (e.g. "What might success look like in 10 years, and who might be excluded?").
- In Pause and Reflect sessions under TRA, teams could use RRI or MARIE tools to explore long-term risks or unintended consequences.
- In IPM discussions, MARIE's responsible prediction tools could help identify risks associated with wider adoption or misuse of an innovation.

4.2 Inclusion

What the CGIAR instruments already do:

The CGIAR's IPSR process includes stakeholder mapping and partnership analysis, and the GenderUp tool provides structured prompts to surface gender-specific impacts and participation gaps. Several innovation programs apply participatory approaches during piloting, and inclusion is often referenced in Theory of Change narratives.

What is missing:

Stakeholder inclusion is often framed in generic terms, without disaggregating by power, lived experience, or historical exclusion. There is limited structured guidance on how to include marginalized groups meaningfully, beyond consultation, and no common prompts for assessing whose voices are shaping design, governance, or benefit sharing. Inclusion of differently abled groups, indigenous peoples, or youth is rarely formalized.

Suggested prompts and tools from external sources:
- EU RRI Practice Handbook: Tools for inclusive governance, including stakeholder reflection templates and participatory design checklists.
- GRP and IDRC: Emphasize inclusion as dynamic, requiring iterative engagement and adjustments over time.
- SCoP Mainstreaming Tracker: Prompts on local actor leadership, inclusion in governance, and sustained engagement post-pilot.
- OECD DAC Scaling Guidance: Encourages integrating marginalized actors in visioning and adaptation processes, not just implementation.

Examples of where/how to apply:
- Insert prompts from RRI or SCoP into IPSR design and scale-readiness review stages (e.g. "Have excluded voices shaped the innovation's definition of success?").
- Add GRP's equity engagement prompts to stakeholder analysis templates.
- Use inclusive governance questions from RRI during scaling strategy or innovation packaging in IPM.

4.3 Reflexivity

What the CGIAR instruments already do:

Pause and Reflect sessions are now a common feature in several CGIAR programs, offering space for teams to review implementation progress. These sessions provide some space for reflection, but they tend to focus on outputs and planned milestones rather than surfacing assumptions, revisiting framing decisions, or asking whether the innovation is still appropriate.

What is missing:
There is limited structured support for deeper reflexivity, for example, questioning how problems are framed, what knowledge counts, or whether the chosen innovation is still the right one. Teams expressed interest in tools that would allow them to reflect not just on progress but on purpose, including revisiting underlying theories of change or shifting assumptions.

Suggested prompts and tools from external sources:
- RRI Practice Handbook: Includes self-assessment templates and team reflection questions designed to support institutional reflexivity.
- Wageningen Reflexive Monitoring: Provides process monitoring tools that track shifts in thinking and help make assumptions explicit over time.
- TIPC: Encourages transformative learning loops, including prompts that surface blind spots and challenge entrenched assumptions.
- GRP: Learning sprint formats that encourage teams to question their initial framing and test emerging insights.

Examples of where/how to apply:
- In MEL planning or annual reviews, introduce structured reflection questions to revisit assumptions and check framing validity.
- In IPSR innovation review cycles, add prompts such as "Is this innovation still responding to the challenge we set out to address?"
- Use WUR's process monitoring tools in participatory design workshops or iterative scaling strategies.

4.4 Responsiveness

What the CGIAR instruments already do:
Responsiveness exists to some extent in the CGIAR through MEL frameworks and adaptive management principles. Pause and Reflect sessions, annual reviews, and occasional reprogramming efforts allow teams to adapt based on emerging evidence or contextual shifts.

What is missing:
While some adaptation occurs, it is often reactive rather than embedded proactively. There is limited guidance on when and how to course-correct, and formal mechanisms for responding to stakeholder feedback or unintended outcomes are often weak. Teams also noted that tight timelines and rigid funding structures sometimes constrain flexibility.

Suggested prompts and tools from external sources:
- TIPC: Offers tools for adaptive evaluation and learning-oriented intervention design.
- GRP: Feedback loops and "safe-to-fail" testing mechanisms designed for complex and dynamic systems.
- IDRC Scaling Science: Dynamic evaluation principles that support equity-driven course correction.
- OECD DAC: Recommends regular reflection points and flexibility in scaling pathways.

Examples of where/how to apply:
- Add formal reflection prompts into work plans or proposal templates to signal an expectation of responsiveness.
- Use GRP's safe-to-fail framing to inform the design of pilots and early-stage scaling efforts.
- Build feedback response protocols into IPM or innovation packaging workflows.

4.5 Legitimacy

What the CGIAR instruments already do:

IPSR includes references to stakeholder engagement and co-creation, and some programs describe consultation processes or participatory validation. However, guidance on legitimacy is not consistently defined or operationalized across tools.

What is missing:

There is little structured support for assessing legitimacy, meaning whether affected groups view innovations as credible, fair, or appropriate. Questions of procedural fairness, transparency, and inclusion in decision-making are rarely surfaced explicitly. Ethical trade-offs and accountability mechanisms are also under-addressed.

Suggested prompts and tools from external sources:

- RRI Handbook: Provides legitimacy checklists and tools to assess procedural justice and public accountability.
- IDRC Scaling Science: Suggests criteria for social legitimacy as part of optimal scaling considerations.
- GRP: Emphasizes contextual legitimacy and multi-stakeholder processes.
- OECD DAC: Incorporates political economy and public trust into system-level scaling guidance.

Examples of where/how to apply:

- Include legitimacy prompts in IPSR scaling-readiness assessments and stakeholder analysis templates.
- Add procedural fairness questions to MEL frameworks and IPM packaging reviews.
- Encourage innovation teams to develop and track context-specific legitimacy indicators.

4.6 Knowledge

What the instruments tools already do:

CGIAR's MEL systems support data collection, synthesis, and use of scientific evidence to inform decision-making. The IPSR Innovation Profile prompts teams to consider evidence of effectiveness, but the emphasis is usually on peer-reviewed or quantitative sources.

What is missing:

Experiential knowledge, Indigenous perspectives, or informal community insights are rarely included in planning, design, or scaling. Tools for integrating diverse knowledge types are scarce, and knowledge hierarchies persist in decision-making spaces.

Suggested prompts and tools from external sources:

- RRI: Tools for recognizing and integrating diverse forms of knowledge (epistemic justice).
- SCoP: Emphasizes local actor experience and tacit knowledge in decision-making.
- CSIRO MARIE: Encourages anticipation-informed science and community co-validation.

Examples of where/how to apply:

- Integrate pluralistic knowledge review prompts into IPSR and MEL design stages.
- Use CSIRO or SCoP tools in participatory assessment and innovation validation processes.
- Support teams to co-develop evidence standards with users or affected groups.

Table 1: Summary of Prompts, Tools and CGIAR Entry Points for Responsible Innovation Dimensions

DIMENSION	SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS IN THE CGIAR
Anticipation	EU RRI, TIPC, CSIRO, IDRC	Foresight, scenario planning, justification, mission framing	IPSR design, TRA learning sessions, IPM innovation packaging
Inclusion	EU RRI, IDRC/GRP, SCoP, OECD	Inclusive governance, iterative engagement, local actor leadership, marginalized group inclusion	IPSR design, MEL cycles, strategy development, scale readiness assessments
Reflexivity	RRI, WUR, TIPC, GRP	Reflection protocols, process monitoring, transformative learning loops	MEL planning, IPSR review, participatory workshops
Responsiveness	TIPC, GRP, IDRC, OECD	Adaptive frameworks, feedback loops, dynamic evaluation, flexible planning	Work plans, pilot design, IPM workflows
Legitimacy	RRI, IDRC, GRP, OECD	Legitimacy checklists, procedural fairness, stakeholder credibility indicators	IPSR assessments, MEL frameworks, strategy reviews
Knowledge	RRI, SCoP, CSIRO	Epistemic justice, knowledge diversity, community validation	MEL design, innovation validation, participatory assessment

4.7 Social Differentiation

What the CGIAR instruments already do:

GenderUp is the clearest example of a CGIAR tool that explicitly addresses differentiation in innovation impacts, focusing on gender-specific barriers and outcomes. Some stakeholder analysis tools also ask teams to consider vulnerable or marginalized populations, though often without disaggregating data by dimensions.

What is missing:

There is no consistent practice of analyzing how innovations might affect people differently based on age, disability, ethnicity, or socioeconomic status. Disaggregation is often limited to sex/gender, and design decisions are not routinely adjusted to reflect these differentiated needs or constraints.

Suggested prompts and tools from external sources:

- WUR: Emphasizes assessing innovations in terms of their differential effects across social groups.
- IDRC: Equity mapping prompts designed to surface how scaling affects diverse user groups.
- SCoP: Power-sensitive actor mapping and engagement strategies that account for layered vulnerabilities.

Examples of where/how to apply:

- Add equity mapping prompts during stakeholder analysis in IPSR design.
- Include differentiation questions in MEL disaggregation plans.
- Use social differentiation reflections during IPM packaging or theory of change discussions.

4.8 Power and Inclusion

What the CGIAR instruments already do:

Most CGIAR projects include stakeholder consultations, and some refer to co-creation with national partners or users. However, there are limited tools for systematically identifying and addressing power dynamics or shifting decision-making authority to marginalized actors.

What is missing:

Power relations (who has control, voice, or authority) are rarely surfaced explicitly. Without this, inclusion can become performative. There are few prompts that encourage teams to share governance, resource control, or influence with affected groups.

Suggested prompts and tools from external sources:

- IDRC: Stakeholder negotiation and benefit-sharing tools, designed to highlight asymmetries in power.
- GRP: Partnership models that encourage adaptive, equitable roles for community-based actors.
- SCoP: Governance inclusion metrics and co-creation planning frameworks.

Examples of where/how to apply:

- Use governance inclusion prompts in IPSR visioning or innovation team formation.
- Introduce negotiation tools into planning templates for delivery partnerships.
- Include power mapping sessions in MEL learning cycles or policy engagement strategies.

4.9 Institutional Fit

What the CGIAR instruments already do:

IPM and TRA processes often include a light review of delivery systems or enabling environments. Some country strategies also consider policy alignment, but this is usually treated at a general level.

What is missing:

Institutional fit is not assessed systematically, and there are no tools that prompt teams to evaluate readiness of delivery systems, incentive structures, or informal norms that may affect uptake. Considerations of political economy or institutional capacity are often overlooked.

Suggested prompts and tools from external sources:

- GIZ: Scalability Self-Check and Theory of Scaling provide practical prompts on alignment, roles, and system readiness.
- OECD DAC: Includes guidance on delivery pathways (public, private, hybrid) and institutional anchoring.
- IDRC: Prompts on contextual alignment and incentive compatibility in scaling pathways.

Examples of where/how to apply:

- Embed institutional fit review into IPM innovation packaging.
- Use GIZ's prompts in Scaling Readiness assessments.
- Reflect on institutional anchoring in strategy development and delivery partnership scoping.

4.10 Adaptive Learning

What the CGIAR instruments already do:

The CGIAR's MEL systems include opportunities for learning, particularly through Pause and Reflect sessions and annual reviews. Some programs document lessons or update their approaches based on emergent findings.

What is missing:

Learning often focuses on outputs rather than assumptions or strategies. There are few structured methods for capturing what has not worked, iterating based on stakeholder feedback, or formally embedding adaptive cycles into program design.

Suggested prompts and tools from external sources:

- GRP: Learning sprints, failure reflection formats, and safe-to-fail testing designs.
- TIP: Transformative learning cycles and feedback adaptation tools.
- ITAD: Adaptive management guidance under uncertainty, including failure tracking and real-time evidence use.

Examples of where/how to apply:

- Use learning sprint models in scaling pilots or IPSR field trials.
- Include failure tracking mechanisms in MEL frameworks.
- Add prompts on assumption-testing and course correction in IPM innovation packaging.

Table 2: Summary of Prompts, Tools and CGIAR Entry Points for Responsible Scaling Principles

PRINCIPLE	SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS IN THE CGIAR
Adaptive Learning	GRP, TIP, ITAD	Learning sprints, failure tracking, transformative learning loops, adaptive management	Scaling pilots, MEL reviews, innovation portfolio review, implementation tracking
Institutional Fit	GIZ, OECD, IDRC	Scalability Self-Check, Theory of Scaling, delivery system frameworks, incentive compatibility prompts	IPM workflows, strategy development, scaling readiness assessments, innovation packaging
Power and Inclusion	IDRC, GRP, SCoP	Stakeholder negotiation, adaptive partnerships, inclusive governance checklists	Delivery partnership design, IPSR visioning, scaling strategy, engagement review
Social Differentiation	WUR, IDRC, SCoP	Social differentiation assessments, equity mapping, power-sensitive actor mapping	IPSR stakeholder analysis, MEL disaggregation, scaling plan design, theory of change

5. LIGHT-TOUCH ADAPTATION GUIDANCE

5.1 Use Without Modification of Existing CGIAR Instruments

The integration prompts presented in this document are not intended to create new CGIAR instruments or add burdensome procedures. Rather, they offer flexible, low-effort entry points that can be integrated into existing processes, templates, and team routines. This light-touch approach enables responsible innovation and scaling to be strengthened incrementally and embedded into ongoing work. **Annex D** provides examples of how these prompts can be integrated into IPM, IPSR, GenderUp, the Scaling Scan, and the Six-Step Approach, enabling teams to select the options most relevant to their context.

5.2 Tag-In Prompts for Responsible Innovation Dimensions and Scaling Principles

Teams can begin by tagging relevant dimensions or principles in their planning, implementation, and reporting tools. For example, IPSR design templates could include optional tags indicating which dimensions (e.g. Inclusion, Anticipation, Institutional Fit) are being actively addressed, with brief notes or links to supporting evidence. IPM workflows might include a reference column to note which aspects of Institutional Fit or Adaptive Learning are being considered. GenderUp or MEL frameworks could also include prompts or checklist options that link back to the responsible innovation dimensions and scaling principles presented in **Section 4**.

5.3 Layering into Planning and Reflection Cycles

Many CGIAR teams already hold Pause and Reflect sessions, Theory of Change reviews, or participatory workshops. These offer ideal opportunities to introduce a small number of guiding questions from the **Annex C** tables, such as “Who might be excluded?” or “What assumptions are we making about user behavior or institutional readiness?”, to surface new insights and improve design decisions.

5.4 Documenting Adaptations and Identifying Gaps

To capture adaptations and learning, teams could include a short note in their regular reporting indicating which dimensions and principles they are working on and how. For example, a project might report that it introduced a GRP-style learning sprint, tested a new inclusion strategy during piloting, or used OECD prompts to reflect on legitimacy in partnership design. This could be as simple as a text box in an IPSR template, MEL plan, or annual report, helping to document emerging practice and identify areas where more support is needed.

This incremental approach respects team capacity while helping to embed responsibility and equity in innovation and scaling efforts across the CGIAR. Stakeholder consultations strongly supported this light-touch strategy, emphasizing the value of adaptive guidance over prescriptive system-wide change.

6. NEXT STEPS AND PILOTING CONSIDERATIONS

The practical guidance and prompts presented here are designed to be used flexibly, based on team needs and Program ambitions. While no formal piloting is required, there are several ways this approach could be trialed or adapted in real-world settings to inform broader uptake across the CGIAR. Programs and teams engaging in piloting may wish to draw on the tool-specific templates in **Annex D** to guide adaptation, monitor progress, and capture lessons learned.

6.1 Voluntary Piloting in One or More Programs

Programs or teams with a strong interest in responsible innovation and scaling may choose to adopt selected prompts or tools more systematically. For example, a Program could integrate equity and inclusion prompts into their IPSR+ rollout, or test the use of the Wageningen University and Research reflexivity questions in regular MEL cycles. A small set of simple metrics or indicators could also be tested to help teams judge whether integration is happening in practice and to capture early signs of added value. These voluntary pilots would help refine the guidance and generate learning that benefits others.

6.2 Feedback Without Formal Piloting

Teams that are not ready for full piloting can still contribute by applying individual elements, such as tagging innovation dimensions and scaling principles in their reports or introducing a small number of prompts in planning or review meetings, and sharing their reflections. A short feedback mechanism (e.g. online form, group discussion, or targeted interview) could be used to capture what worked, what was challenging, and what further support would be useful. This informal learning loop can shape future versions of the guidance and ensure it remains grounded in real implementation experience.

6.3 Support from the Scaling for Impact Program and Portfolio Performance Unit (PPU)

The Scaling for Impact Program and PPU are well-placed to support uptake by helping to facilitate peer learning, share examples across teams, and connect this work to other ongoing initiatives such as IPSR+ or strategy reviews. They could also facilitate connections between Program teams and external resources, such as TIP Labs, GRP partners, or scaling communities of practice, where relevant. Over time, they may also help identify where formalization or system-wide support would be helpful, based on emerging good practice and demand from users.

By encouraging experimentation, documenting learning, and keeping the process lightweight, the CGIAR can begin to embed responsible innovation and scaling more fully, without waiting for system-level reform. Sustained uptake will also require institutional and leadership support, which is addressed in a separate Implementation Report focused on adoption scenarios, rollout options, and capacity needs.

7. CONCLUSION

This proposal offers a practical and flexible starting point for embedding responsibility, equity, and contextual awareness into the CGIAR's innovation and scaling processes. It builds on the findings of the Framework Analysis Report and on stakeholder consultations that identified both promising entry points and persistent gaps, particularly in reflexivity, legitimacy, and attention to power. Rather than introducing new instruments or burdensome requirements, it draws from existing CGIAR instruments and globally recognized frameworks, complemented by optional "tag-in" tools, to offer adaptable prompts, guidance, and integration options. The approach is intentionally modular, allowing Programs and Initiatives to engage at different levels, through quick-start actions, light-touch adaptations, or deep-dive program-level integration, depending on their capacity, priorities, and influence over processes.

By supporting teams to reflect more explicitly on issues such as inclusion, legitimacy, and institutional fit, this guidance aims to strengthen both the quality and credibility of the CGIAR's work on responsible innovation and scaling. It also responds to what stakeholders clearly articulated during consultations: the need for usable, low-barrier options that fit real-world workflows. Menus of prompts for six dimensions of responsible innovation and four principles of responsible scaling (**Section 4**) provide a core practical resource for teams, while **Annex D** offers instrument-specific entry points for IPM, IPSR, GenderUp, the Scaling Scan, and the Six-Step Approach. Optional tag-in tools such as MDII, GALS, GESI, and HCD can strengthen inclusion, accountability, and contextual relevance in specific settings.

As these integration options are piloted and adapted, continued learning and feedback will be critical. Future iterations can draw on implementation experience to refine prompts, identify additional entry points, and support more consistent alignment across the CGIAR system, while leaving room for innovation, autonomy, and local relevance. Sustaining uptake will depend not only on the practicality of the guidance but also on teams seeing its clear value and on incentives or recognition mechanisms that encourage its use. By combining structured yet adaptable menus, clear integration pathways, and light-touch adaptation guidance, this proposal responds directly to stakeholder calls for practical, low-barrier support. With sustained leadership backing and continued peer learning, these options can help the CGIAR mainstream responsible innovation and scaling without overburdening teams, while reinforcing quality, credibility, inclusivity, and long-term impact.

ANNEX A: EXTERNAL FRAMEWORKS AND TOOLS FOR RESPONSIBLE INNOVATION AND SCALING

A1: External Frameworks and Tools

FRAMEWORK/ TOOL	KEY DIMENSIONS/ PRINCIPLES	OPERATIONAL USE	RELEVANCE FOR CGIAR	PROMPTS/ TOOLS
EU RRI Practice Handbook	Structural enablers (policy, leadership, capacity, learning); RRI keys (gender, ethics, open access)	Used in EU research institutions and national innovation systems	Offers practical insights for embedding RRI through capacity-building, internal reflection, and organizational change	Self-assessment questions, RRI institutional maturity tool, policy audit guide
TIPC Transformative Innovation Policy	Transformative outcomes; directionality; anticipation; inclusion; reflexivity; challenge-led missions	Used in country-level innovation systems (e.g. Colombia, South Africa, Sweden); tested in research councils and policy labs	Strong conceptual and practical links to responsible innovation; adds value on visioning, governance, and assessing systems change beyond outputs	Transformative Outcomes Checklist, Evaluation Questions Toolkit, Actor Mapping, Mission Framing Worksheet, System Reflexivity Prompts
IDRC Scaling Science	Justification, Optimal Scale, Coordination, Dynamic Evaluation	Used across research for development initiatives, including health and agriculture (e.g. in Nigeria and Tanzania case studies)	Aligns with Responsible Scaling dimensions; practical guidance for systems-aware, adaptive scaling with stakeholder inclusion	Framing questions (e.g. Why scale? Who is impacted?), scaling system mapping, learning/ adaptation plans, multi-dimensional impact worksheet
GIZ Scaling Agricultural Innovations	Theory of Scaling (innovation, impact, environment); institutional fit; adaptive monitoring; scaling-readiness	Applied in agriculture and rural development, focused on context-driven pathways and systems alignment	Aligns with Responsible Scaling principles (esp. institutional fit, adaptive learning); offers clear tools for assessing scaling-readiness and tailoring pathways	Scalability Self-Check, Impact Pathway Canvas, Theory of Scaling prompts, Adaptive Monitoring Checklist, Role Mapping
Global Resilience Partnership (GRP) Challenge Funds	Learning from failure; resilience incubation;	Applied in 35+ projects across Africa and Asia	Demonstrates how to operationalize	Scalability Assessment, Learning Sprint

	flexible funding; trust-based partnerships; safe-to-fail scaling	through challenge funds and incubators	adaptive learning, risk tolerance, and trust in scaling; relevant to IPSR+ and innovation incubation	Cycles, "Failure Fest" workshop design, Resilience and Scaling Assessment, probe–sense–respond model
Scaling Community of Practice (SCoP) Mainstreaming Initiative and Fundamentals	Transactional vs. transformational scaling; scaling pathways; systems change; enabling conditions; intermediation; project-based challenges	Used by funders to assess and plan for scaling across strategy, leadership, funding, MEAL, and partnerships; Mainstreaming Tracking Tool includes 13 elements scored across 5 stages	Offers detailed, funder-oriented guidance on mainstreaming scaling that could inform how the CGIAR positions IPSR and system-level integration; highlights risks of transactional approaches and importance of sustained engagement	Mainstreaming Tracker (13-element tool); scaling pathway model (6 stages); typology of system-change integration; reflective prompts around handoffs, localization, and institutional fit
OECD DAC Guidance on Scaling Development Outcomes	Optimal scale; scaling pathways; systems practices; adaptive learning; local ownership; institutionali-zation; business models; funder strategy	Applied by bilateral and multilateral funders to shape strategy, programming, and implementation processes	Useful in engaging funders, building pathways to scale, and embedding scaling in systems and governance; reinforces the importance of alignment with local actors, financial sustainability, and organizational integration	Visioning for optimal scale; stakeholder ownership prompts; institutional readiness assessments; planning for sustainability and handover
CSIRO MARIE Framework & Responsible Innovation Future Science Platform	Responsible Innovation (anticipation, inclusion, reflexivity, responsiveness); Mission-Oriented Innovation; MARIE (strategy, programming, implementation)	Applied in drought resilience, climate and genetic tech, and digital innovation through programs like MyClimateView and Future Drought Fund	Provides an empirical model of integrating RI into innovation missions; highlights coordination across levels and stakeholder roles; offers tools for applied RI and mission learning	MARIE framework, stakeholder mapping, reflexive monitoring, responsible prediction models, social risk management tools

A2: Complementary or Domain-Specific Tools Raised in Consultations

TOOL / APPROACH	DEVELOPER / SOURCE	PRIMARY FOCUS	RELEVANT DIMENSIONS	APPLICATION IN CGIAR
Multidimensional Digital Inclusiveness Index (MDII)	CGIAR Digital Innovation Initiative / IWMI	Assessing inclusion and usability of digital tools	Inclusion, Legitimacy, Responsiveness	Used in WaPOR, IRRI, Farmerline pilots
GALS (Gender Action Learning System)	Oxfam / IFAD / various NGOs	Gender-transformative participatory planning	Inclusion, Reflexivity	Applied in select CGIAR programs (e.g. gender & climate)
GESI Markers / Checklists	Various CGIAR Initiatives	Gender and social inclusion diagnostics	Social Differentiation, Power and Inclusion	Used in proposal design and innovation packaging
REACH-STAR	IWMI	Voice and engagement of underserved users	Legitimacy, Inclusion	Used in water governance and innovation design
Human-Centered Design (HCD)	IDEO / Design Thinking approaches	Iterative co-design with users	Inclusion, Legitimacy, Reflexivity	Applied in digital innovation and product development

Stakeholder consultations also noted the GESI (Gender Equity and Social Inclusion) Accelerator as a potentially relevant initiative. While it is not proposed as a core integration instrument, its emphasis on system-level inclusivity complements CGIAR methodologies and tools. Stakeholders also mentioned the REACH-STAR method for engaging underserved users in innovation design in water governance (under development by IWMI) as potentially relevant, although no public materials on this tool were available at the time of this consultancy. It is therefore not included in the integration menus, but remains an area for future monitoring.

ANNEX B: KEY RESOURCES FOR EXTERNAL FRAMEWORKS AND COMPLEMENTARY TOOLS

FRAMEWORK/ TOOL	RESOURCE LINKS
European Union's Responsible Research and Innovation (RRI) Framework	• Wilford, S., Fisk, M., & Stahl, B. (2016). Guidelines for Responsible Research and Innovation. Centre for Computing and Social Responsibility, De Montfort University, Leicester, UK. https://www.great-project.eu/Deliverables10
Transformative Innovation Policy Consortium's Transformative Innovation Policy (TIP) Framework	• Boni, A., Giachi, S., & Molas-Gallart, J. (2019). Towards a Framework for Transformative Innovation Policy Evaluation. Transformative Innovation Policy Consortium (TIPC), University of Sussex, Brighton, UK. https://tipconsortium.net/wp-content/uploads/2019/07/Towards-a-Framework-for-TIP-Evaluation-Designed.pdf
International Development Research Center's Scaling Science Framework	• Price-Kelly, H., van Haeren, L., & McLean, R. (2020). The Scaling Playbook. International Development Research Centre, Ottawa, Canada. https://idl-bnc-idrc.dspacedirect.org/bitstream/handle/10625/58780/IDL-58780.pdf?sequence=2&isAllowed=y
Wageningen University and Research's Reflexivity Dimensions	• Wigboldus, S., with Brouwers, J. (2016). Using a Theory of Scaling to guide decision making: Towards a structured approach to support responsible scaling of innovations in the context of agrifood systems. Wageningen University & Research, The Netherlands. https://edepot.wur.nl/405915
GIZ's Theory of Scaling and Scaling Readiness Tools	• Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) GmbH. (2024). Scaling Toolkit: a guide to scaling (digital) innovation in international cooperation. GIZ, Bonn, Germany. https://www.bmz-digital.global/wp-content/uploads/2024/04/GIZ-Toolkit-for-Scaling-Digital-Innovation-19032024.pdf
Global Resilience Partnership's (GRP) Adaptive Scaling Approach	• Global Resilience Partnership. (2020). Case Study: Learning from Failure to Accelerate Success in Resilience-Building Initiatives. GRP: Stockholm, Sweden. https://www.globalresiliencepartnership.org/wp-content/uploads/2020/08/case-study_learning-from-failure-at-the-global-resilience-partnership.pdf
Scaling Community of Practice (SCoP) – Mainstreaming Initiative and Fundamentals Framework	• Cooley, L., & Linn, J. (2024). Scaling Fundamentals. Scaling Community of Practice. https://scalingcommunityofpractice.com/wp-content/uploads/2024/05/Fundamentals-Updated-11.2024.pdf • Kohl, R., & Cooley, L. (2025). Mainstreaming Scaling Initiative, The Mainstreaming Tracker. Scaling Community of Practice. https://scalingcommunityofpractice.com/wp-content/uploads/2025/03/Final-Mainstreaming-Tracking-Tool-V2.pdf
OECD DAC Guidance on Scaling Development Outcomes	• OECD. (2024). DAC Guidance on Scaling Development Outcomes, Best Practices in Development Co-operation. OECD Publishing, Paris, France. https://doi.org/10.1787/621810cc-en
CSIRO's Mission-Oriented and	• CSIRO. (2024). *Responsible Innovation at CSIRO.* Canberra, Australia. https://research.csiro.au/ri/wp-

Responsible Innovation Ecosystems (MARIEs)	content/uploads/sites/320/2024/04/Responsible-Innovation-at-CSIRO.pdf
Multidimensional Digital Inclusiveness Index (MDII)	• Martins, C.I., et al. (2024). Multidimensional Digital Inclusiveness Index: dimensionality reduction for improved applicability in Digital Agri-solutions. International Water Management Institute, Colombo, Sri Lanka. https://hdl.handle.net/10568/163059
Gender Action Learning System (GALS)	• Oxfam Novib. (2014). Gender Action Learning System: Practical Guide for Transforming Gender and Unequal Power Relations in Value Chains. Oxfam Novib, The Hague, The Netherlands. https://www.oxfamnovib.nl/Redactie/Downloads/English/publications/150115_Practical%20guide%20GALS%20summary%20Phase%201-2%20lr.pdf • IFAD. (2022). How To Do Note: How to integrate the Gender Action Learning System (GALS) in IFAD operations. IFAD, Rome, Italy. https://www.ifad.org/documents/48415603/49780660/htdn_gals.pdf/db292491-6f56-0dcd-c81c-f7f91f94b73c?t=1726642515188
Gender Equality and Social Inclusion (GESI) markers or checklists	• Njiru, A., et al. (2023). The CGIAR Food Systems Accelerator: Cohort one. Gender Equality and Social Inclusion technical assistance report. CGIAR Initiative on Diversification in East and Southern Africa, International Water Management Institute (IWMI), Colombo, Sri Lanka. https://hdl.handle.net/10568/130852 • Mapedza, E. et al. (2022). Framework Report for incorporating Gender Equality and Social Inclusion (GESI) elements in Climate Information Services (CIS). CGIAR Initiative on Diversification in East and Southern Africa, International Water Management Institute (IWMI), Colombo, Sri Lanka. https://hdl.handle.net/10568/119246
Human-Centered Design (HCD) principles	• IDEO. (2015). The Field Guide to Human-Centered Design. IDEO.org., San Francisco, USA. http://designkit.org/resources/1.html

ANNEX C: PROMPTS AND ENTRY POINTS FOR RESPONSIBLE INNOVATION DIMENSIONS AND SCALING PRINCIPLES

C1: Anticipation Prompts and Entry Points in the CGIAR

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
EU RRI Practice Handbook	• What are the broader consequences if this innovation becomes mainstream? • What risks might emerge if uptake occurs unevenly?	• IPSR design stage • TRA learning sessions
TIPC Transformative Outcomes	• Mission framing guides • Prompts on directionality and systems change	• Strategy development • IPSR innovation justification
IDRC Scaling Science	• Why scale now? • What unintended effects might emerge at scale?	• Scaling Readiness process • IPSR checklist
CSIRO MARIE	• Responsible prediction models • Scenario mapping tools	• IPM innovation packaging • Foresight in Impact Area strategies

C2: Inclusion Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS IN THE CGIAR
EU RRI Practice Handbook	• Stakeholder mapping templates • Prompts on inclusive governance and deliberation	• IPSR design phase • Partnership strategy development
IDRC/GRP	• Iterative engagement frameworks • "Inclusion is a process" lens	• Innovation piloting and MEL cycles
SCoP Mainstreaming Tracker	• Questions on local actor leadership, shared decision-making, and long-term engagement	• Scale readiness assessments • Innovation packaging
OECD DAC Scaling Guidance	• Guidance on engaging marginalized groups in defining goals, not just delivery	• Proposal design • Country strategy development

C3: Reflexivity Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
EU RRI Practice Handbook	• Reflective self-assessment templates • Questions to surface assumptions and motivations	• MEL planning • Team inception meetings
WUR (Reflexive Monitoring)	• Process monitoring for learning • Reflection on logic and framing	• Pause and Reflect sessions • IPM learning cycles
TIPC	• Transformative outcomes framework	• Strategy development • IPSR adaptation

	• Reflexivity and system awareness prompts	
GRP	• Feedback loops in resilience learning • Self-critical reflection models	• Innovation piloting • Learning sprints

C4: Responsiveness Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
TIPC	• Adaptation-oriented transformative outcomes • Strategic flexibility tools	• Scaling pathways in IPSR • Innovation portfolio review
GRP	• Real-time course correction frameworks • Community-responsive iteration	• MEL reviews • Innovation experimentation
IDRC Scaling Science	• Dynamic evaluation • Adjustment to emerging data and equity concerns	• Scaling Readiness updates • Program reviews
OECD DAC	• Guidance on adapting to context and risk • "Right-fit" planning tools	• Project design • Portfolio-level MEL

C5: Legitimacy Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
EU RRI Practice Handbook	• Governance transparency prompts • Public accountability self-assessments	• IPSR innovation profiles • Policy engagement strategies
IDRC	• Credibility assessments • Stakeholder validation tools	• MEL systems • IPM reviews
GRP	• Perceived legitimacy tracking in resilience partnerships	• Scaling pilots • Community feedback mechanisms
OECD DAC	• Guidance on ownership, consent, and representation in scaling	• Country strategy design • Institutional anchoring plans

C6: Knowledge Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
EU RRI	• Knowledge pluralism prompts • Inclusion of lay, local, and experiential knowledge	• Evidence planning in MEL • Co-design workshops
SCoP	• Community validation frameworks • Local actor knowledge co-creation tools	• IPSR and IPM stakeholder sessions
CSIRO (MARIEs)	• Responsible data use • Interdisciplinary evidence integration guides	• Innovation design • Scaling risk assessments

C7: Social Differentiation Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
WUR	Social differentiation assessment	IPSR stakeholder analysis, MEL disaggregation
IDRC	Equity mapping questions	Innovation design, scaling plan development
SCoP	Power-sensitive actor mapping	Theory of change, MEL system design

C8: Power and Inclusion Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
IDRC	Stakeholder negotiation and benefit-sharing prompts	Delivery partnership design, IPSR visioning
GRP	Adaptive partnership tools	Scaling strategy, governance planning
SCoP	Inclusive governance checklists	Co-creation and engagement review

C9: Institutional Fit Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
GIZ	Scalability Self-Check, Theory of Scaling	IPM workflows, scaling readiness assessments
OECD	Scaling pathways and delivery system frameworks	Strategy development, partnership review
IDRC	Contextual fit and incentive compatibility prompts	Scaling plan, innovation packaging

C10: Adaptive Learning Prompts and Entry Points

SOURCE	KEY PROMPTS OR TOOLS	POTENTIAL ENTRY POINTS
GRP	Learning sprints, failure tracking	Scaling pilots, MEL reviews
TIP	Transformative learning loops	Innovation portfolio review, strategic learning
ITAD	Adaptive management under uncertainty	MEL systems, implementation tracking

ANNEX D: SAMPLE TAG-IN GUIDANCE FOR CGIAR INSTRUMENTS

This annex provides instrument-specific integration prompts and entry points for applying responsible innovation and scaling dimensions in selected CGIAR instruments. The aim is to provide practical, low-burden suggestions that teams can adapt depending on their context and priorities. The methodologies and tools included here (IPSR, IPM, GenderUp, the Scaling Scan, and the Six-Step Approach) are operational and used directly by CGIAR programs or teams. Other instruments reviewed in the Framework Analysis, such as the Technical Reporting Arrangement (TRA) and the Performance and Results Management Framework (PRMF), are omitted, since they are institutional frameworks in use at the system level and are not directly modifiable by innovation teams. They remain important for alignment and upstream reporting but are not the focus of this guidance. In addition to AoW3 and AoW5, stakeholders noted that AoW2's transition criteria for moving activities into thematic flagships provide a natural entry point for embedding responsible scaling reflections.

D.1: Innovation Portfolio Management (IPM)

The Innovation Portfolio Management (IPM) methodology supports CGIAR teams and programs to organize, analyze, and balance their innovation portfolios strategically. It encourages coordination across innovations, stages, partners, and geographies. While IPM is not a direct delivery instrument, it offers several entry points for embedding responsible innovation dimensions and scaling principles at the portfolio level, particularly around institutional fit, adaptive learning, and inclusion.

D.1.1 Portfolio Review and Curation

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Social Differentiation	Ensure representation of innovations reaching different user groups	Do portfolio innovations serve a range of genders, ages, or marginalized populations? Where are the gaps?
Inclusion, Power	Review partner roles in innovation development and scaling	Are local or underrepresented partners active co-creators or primarily implementers?
Knowledge	Reflect on the balance of scientific, local, and practitioner knowledge	How diverse are the knowledge sources feeding into this portfolio?

D.1.2 Portfolio Learning and Adaptation

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Adaptive Learning	Include space for learning loops and portfolio-wide reflection	What insights have emerged across innovations? How are they being fed back into design or scale plans?
Anticipation	Map expected and unintended effects at portfolio level	What second-order impacts (e.g. environmental, social) are emerging? Are any innovations duplicative or in tension?
Legitimacy	Include validation mechanisms for innovation prioritization	How were decisions made on which innovations to include or prioritize? Whose needs are reflected?

This guidance supports teams to embed responsible innovation and scaling not just at the level of individual innovations, but across their full portfolio. Prompts can be layered into review templates, dashboards, MEL frameworks, or strategy discussions.

D.2: Innovation Packages and Scaling Readiness (IPSR)

The IPSR methodology is one of the CGIAR's core instruments for identifying, developing, and supporting innovations with scaling potential. It comprises three stages: Innovation Profile, Innovation Packaging, and Scaling Readiness Assessment. The following tables present suggestions for integrating responsible innovation and scaling dimensions at each stage of IPSR.

D.2.1 Innovation Profile

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Legitimacy, Inclusion	Add a reflection section on problem framing	Whose perspectives shaped the definition of the problem? Who might be excluded from the solution?
Social Differentiation	Add a basic demographic breakdown of intended users/beneficiaries	Which groups (e.g. gender, age, livelihood) are likely to benefit or face barriers?
Anticipation	Prompt for potential unintended effects	What trade-offs or risks could emerge as this innovation scales?
Ethics	Include a checklist for ethical considerations	Have risks to users/communities been considered? Was consent obtained for any testing?
Reflexivity	Add a short textbox for revisiting assumptions	What assumptions underlie the innovation's design? Are they still valid?

D.2.2 Innovation Packaging

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Institutional Fit	Include questions on enabling environment and delivery system readiness	Which institutions need to be engaged for this to scale sustainably? What are their incentives?
Power and Inclusion	Reflect on actor roles and decision-making	Who holds influence in the packaging process? Are local actors co-designing or just consulted?
Adaptive Learning	Encourage inclusion of testing and learning components	Is the packaging designed to evolve based on feedback? What will be monitored and adapted?
Knowledge	Tag relevant evidence and co-creation inputs	What local or tacit knowledge informed the packaging decisions?

D.2.3 Scaling Readiness Assessment

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Social Differentiation	Encourage disaggregated assessment of readiness	Is the system equally ready for all target groups? Who may be disadvantaged?
Institutional Fit	Review scaling readiness by actor/system type	Are public/private/NGO delivery systems ready and resourced to adopt the innovation?
Legitimacy	Include a step for community or user validation	Is the innovation viewed as appropriate by intended users? How was this assessed?
Adaptive Learning	Integrate feedback loops and iterative testing	What adaptations have occurred, and what mechanisms are in place to revise scaling plans?

This IPSR-specific guidance can be adapted based on where teams have influence, whether during Innovation Profile development, innovation packaging design, or program-level scaling assessments. These entry points aim to surface assumptions, broaden stakeholder engagement, and increase contextual fit and equity as innovations move toward scale.

D.3: GenderUp

GenderUp is a tool developed by CGIAR and partners to help teams reflect on how gender dynamics shape innovation pathways, impacts, and scaling. While it currently focuses on gender, the underlying structure lends itself well to broader equity and inclusion concerns. It already includes prompts on intersectionality, agency, and benefit-sharing, but could be extended by incorporating additional responsible innovation dimensions and scaling principles, e.g. legitimacy, reflexivity, and institutional fit.

D.3.1 Using GenderUp to Broaden Inclusion and Reflexivity

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Legitimacy	Add prompts on whose perspectives were included in validating the innovation or its scaling logic	Who defined success for this innovation? Have target groups validated the approach?
Reflexivity	Encourage teams to examine their own positionality and assumptions	What assumptions are shaping our view of risks, benefits, or feasibility?
Power and Inclusion	Integrate prompts on voice, influence, and shared decision-making	Who has a seat at the table in innovation design and scaling decisions?
Knowledge	Acknowledge different knowledge systems beyond formal evidence	What informal or experiential knowledge shaped the design?

D.3.2 Tagging GenderUp Results to Other Innovation Tools

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Social Differentiation	Use GenderUp findings to inform IPSR stakeholder analysis or MEL disaggregation	What population subgroups need tailored engagement based on GenderUp results?
Institutional Fit	Feed GenderUp findings into IPM or scaling readiness discussions	Has GenderUp identified the institutional partners equipped to support equitable outcomes?
Adaptive Learning	Link GenderUp results to learning sprints or pilot adaptation plans	Have any unintended effects or design change needs emerged?

This integration would allow GenderUp to serve as a springboard for broader responsible innovation analysis, not just a standalone gender tool. It can help surface deeper insights into power, legitimacy, and adaptive capacity.

D.4: Scaling Scan

The Scaling Scan is a CGIAR tool, originally co-developed with Wageningen University and Research (WUR) and PPPLab, that helps teams assess the readiness of innovations to scale by reflecting on ten key scaling ingredients, such as finance, partnerships, and user demand. Many of its components align with responsible scaling principles, particularly institutional fit, adaptive learning, and social differentiation. The suggestions below show how the tool can be strengthened or linked to the dimensions of responsible innovation and principles of responsible scaling.

D.4.1 Enhancing Use of the Scaling Scan

Principle or Dimension	Integration Entry Points	Example Prompt or Tag
Anticipation	Use the tool to explore potential risks and knock-on effects of scaling	What unintended outcomes might emerge as scaling progresses?
Legitimacy	Add a prompt to assess credibility and acceptance by end users and communities	Do intended users see this innovation as acceptable, fair, or trustworthy?
Institutional Fit	Deepen analysis of delivery system alignment and policy readiness	What are the incentives or disincentives for the institutions expected to scale this innovation?
Adaptive Learning	Introduce a reflection loop after initial scoring to revisit assumptions and update plans	Have initial scaling plans been adapted based on real-world constraints or learning from pilots?
Social Differentiation	Apply disaggregated thinking to the “user awareness” and “market demand” ingredients	Are different population groups equally aware of or able to access this innovation?

This enhanced use of the Scaling Scan can help teams move from a checklist approach to a more reflective and equity-sensitive scaling strategy. It remains a practical and accessible tool, particularly when paired with other prompts from this guidance.

D.5: Six-Step Approach for Scaling Low-Emission Food Systems

The Six-Step Approach for Scaling Low-Emission Food Systems is a CGIAR tool co-developed with research partners to guide innovation teams through a structured, step-by-step process for scaling. It emphasizes inclusive stakeholder engagement, climate mitigation, and contextual fit. While it is already grounded in responsible scaling principles, there are opportunities to make responsible innovation dimensions such as inclusion, legitimacy, and reflexivity more explicit.

D.5.1 Strengthening Responsible Innovation and Scaling within the Six Steps

Step	**Principle or Dimension**	**Integration Entry Point**	**Example Prompt or Tag**
Step 1: Define the innovation and scaling ambition	Legitimacy	Include prompts to assess who shaped the scaling goal and whether it is seen as credible by local actors	Who defined the scaling ambition? Is it shared and accepted by users or communities?
Step 2: Identify scaling objectives and key functions	Institutional Fit	Include prompts for alignment with delivery systems and policy context	What institutions must support this innovation at scale? Are they ready and motivated?
Step 3: Map the innovation system and scaling environment	Power and Inclusion	Add a lens to map influence and voice, not just roles	Who holds power in this system? Whose voices are missing or under-represented?
Step 4: Design a scaling strategy	Adaptive Learning, Reflexivity	Build in mechanisms to revisit the strategy over time	What feedback loops are built into the strategy? What assumptions are guiding our approach?
Step 5: Develop an implementation and partnership plan	Social Differentiation, Inclusion	Add tagging or analysis of expected differential impacts by user group	Will certain populations be disadvantaged by the scaling pathway? How will this be addressed?
Step 6: Monitor and learn from scaling efforts	Adaptive Learning, Anticipation	Include prompts to identify unintended outcomes and guide course correction	What unexpected outcomes have occurred? How have they changed our scaling pathway?

This guidance supports teams in using the Six-Step Approach as a living, adaptive tool that encourages iterative learning and equitable outcomes, especially in complex systems such as climate-smart agriculture and food systems transformation.