



Details on the methodology used for the adaptive management section in the 2023 Portfolio Narrative

The synthesis and analysis of CGIAR's 2023 adaptive management process developed for the 2023 Portfolio Narrative was conducted using a **hybrid human-AI methodology**. This approach combined advanced AI-driven analysis with meticulous human review and interpretation to ensure accuracy and sufficient depth. The methodology was designed to handle the complex and rich data set efficiently, maintaining the integrity of the insights derived from Initiatives, SGPs and Platforms; it was refined based on insights gained from an AI experiment conducted the previous year, coupled with a process of trial and error.

Process

1. **Combining data and human review:** The adaptive management section in all CGIAR 2023 Type 1 reports were compiled into a single document, clearly marking each Initiative, SGP, and Impact Platform alongside their specific recommendations and rationales. This was followed by a thorough human review process to ensure the accuracy of the data, resolve any abbreviations, and obtain additional clarifications where necessary. This preparatory step was crucial for setting a solid foundation for the detailed analysis that would follow.
2. **Initial data analysis and high-level overview:** Initially, human analysts reviewed the data to identify major topics, priorities, and opportunities, which set the stage for deeper AI integration. Subsequently, AI tools, particularly tailored prompts in ChatGPT, were utilized to create a high-level overview of the main themes and challenges. This helped in identifying common threads and significant differences that warranted further exploration.
3. **Deep dive into themes:** Specific queries were then directed to the AI tool to delve deeper into the previously identified themes, allowing for an exploration of nuances and the extraction of detailed insights and unique strategies across the various submissions. Human analysts supplemented this AI-driven analysis by incorporating relevant examples and conducting comparative analyses, thereby highlighting the diverse approaches and strategies utilized across the Portfolio.
4. **Synthesis and iterative feedback:** The insights gathered from the detailed theme analysis were synthesized into coherent recommendations. This process involved a blend of AI-generated content and human-generated content as well as human editorial oversight to ensure both clarity and relevance. An iterative feedback loop was integral to this step, involving multiple revisions of the synthesis to refine its focus and depth.

5. **Final synthesis and quality assessment:** The final synthesis was carefully crafted, distilling the comprehensive analyses into a structured narrative that emphasized key findings and strategic recommendations. This final document underwent a human review to ensure it met the highest standards of quality and relevance. An editor with a fresh perspective was also involved to further refine the language and style, ensuring the final output was polished and showed consistency with other sections of the 2023 Portfolio Narrative.

Reflections on AI integration

Advantages:

The integration of AI, specifically ChatGPT, into the synthesis process offers advantages:

1. **Efficiency:** AI markedly enhances the speed of data processing and initial analysis, facilitating the rapid aggregation of themes and identification of commonalities and disparities across extensive datasets. This reduces the overall costs to produce the synthesis of textual data.
2. **Comprehensive analysis:** AI tools enable a broader analysis of textual data, providing preliminary insights that human analysts further refine. This capability is particularly beneficial in distilling complex and vast information (approximately 35 pages of rich recommendations) into digestible themes.

Management of potential biases:

While AI is a powerful analytical tool, it inherently reflects the biases present in its training data – all sourced from human-generated content. To counteract this, human oversight through a group of diverse professionals is critical at every stage of the synthesis process. Each segment of AI-generated content is reviewed, edited, and validated against the original data to ensure it faithfully represents the inputs from CGIAR's diverse Portfolio and adheres strictly to the provided source material.

Suggestions for future use:

ChatGPT is best utilized as a **complementary tool** rather than a standalone solution, adding value to the synthesis and analysis process. Enhanced training on and effective design of prompts could improve ChatGPT's utility, making it a more robust aid in the synthesis process. The critical questioning and rigor applied to reviewing ChatGPT's outputs is indispensable.