

**Report Document**

***Strategic Planning  
for Roster Management  
Consolidating best practices for  
quality referral services***

Workshop – 23-25 July 2003 – Beirut Lebanon

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## **1- Executive Summary**

### ***Workshop:***

"Strategic Planning for Roster Management: consolidating best practices for quality referral services" - Beirut, Lebanon – July 23<sup>rd</sup> to 25<sup>th</sup>, 2003

### ***Participants:***

Steve Glovinsky (BDP)	Johan Arvling (Pacific, Northeast and Southeast Asia SURF)
Francisco Simplicio (SU-TCDC)	Sunita Lamichhane (South and West Asia SURF)
Martin Backlund (BDP)	Andrea Cuzyova (Eastern Europe and CIS SURF)
Cesar Silang-Cruz (BCPR)	Cory Brandt (West Africa SURF)
Ramla Khalidi (Arab States SURF)	
Lina Habre (Arab States SURF)	
Hanin Ghaddar (Arab States SURF)	

### ***Goals:***

The workshop was organized within the scope of the SU-TCDC/BDP partnership towards making the best of the ERP to implement talent management in the organization:

- to build and manage BDP's rosters of experts on WIDE's platform;
- to advance and refine WIDE's requirements and user interface design to operate as an bridging solution.

The three-day meeting was programmed to produce, with the active participation of the selected group of direct users and managers of the SURF rosters, a comprehensive strategic plan for the rollout and continuous improvement of WIDE's roster platform.

### ***Development of the workshop:***

- 1) The participants were introduced to:
  - the terms of the partnership initiative between SU-TCDC and BDP;
  - the design blueprint of the reengineered WIDE's platform, its functions and features.
- 2) The participants presented their particular experience and roster solution.
- 3) In a very participative and intensive way, the participants discussed "The 12 ½ labours of WIDE", a set of challenges and answers previously identified throughout the process of WIDE's reengineering that started in a workshop held in November 2002. The reengineering of WIDE aims at

upgrading its roster management functions in order to address adequately the requirements of its new role as an integrated platform for building and managing rosters.

The challenges identified and answered by WIDE are:

1. How to deal with the diversity of rosters and why.
2. How to integrate the rosters and still accommodate particular requirements.
3. Why to create common data standards and how.
4. How to use taxonomy for the skills sets.
5. How to establish membership criteria.
6. How to manage the resume self-service entry.
7. How to manage recommendations.
8. How to manage queries and referrals.
9. How to manage communication with roster members.
10. How to ensure security.
11. What are the adequate terms of service.
12. How to track the performance of the referrals.
- 12½. How to migrate data from existing databases.

### ***Conclusions achieved:***

The workshop successfully led to:

1. Confirmation of the suitability, opportunity and complementarities of the partnership between SU-TCDC and BDP;
2. Confirmation of the feasibility of using WIDE, with the refined design, to support the SURF's;
3. Confirmation of the inherent complexity of the challenges identified by WIDE;
4. Confirmation of the adequacy of the answers brought by WIDE to address them;
5. Recognizing the diverse and uneven set of roster management functions among the existing rosters;
6. Shared commitment of the participants to the partnership between SU-TCDC and BDP;
7. Common understanding of the important contribution WIDE's platform will bring to the maintenance of an adequate set of tool support for roster management, considered as the main requirement for a successful referral service;
8. Definition of the four stages of the strategic planning for the roll-out of WIDE's roster management functions to the SURF's.

## **2 – Summary of requirements**

**A. Goal:** For UNDP to become a “world class” service for consultant referral

SU-TCDC/BDP partnership will support, through the use of WIDE's platform, the upgrading of the quality of UNDP's worldwide service for the referral of consultants.

**B. Basic Principles:** 3 keys to success –

- **Quality** – strive to deliver the best, most relevant consultants in a timely manner
- **Ownership** – recognize and protect the “intellectual property” of units and their staff
- **Simplicity** – stay as close as possible to the simplest “CV file list” model

**C. Basic Structure:** a “federation” of rosters which use the same templates and processes

- Any unit in UNDP can establish a roster to build their talent pool – SURFs, Bureaux, COs, (a “roster builder” wizard would enable it)
- The roster “owners” are all members of the unit
- Each roster has one or more staff assigned to roster management and administrative functions (“Roster Manager”):
  - Sourcing new talent
  - CV management (data entry; cataloguing; validating; updating)
  - Referral services (determine qualifications; search; screen; propose candidates)
  - Consultant relationship management
  - Performance feedback (follow-up calls and notations)
  - Roster system administration (user rights, etc)
  - First-line help desk for system users and user training
- **Every active consultant in a unit's roster must be sponsored by a unit member.** Sponsors are responsible for ensuring the quality of their consultants.
- Non-active consultants go into the roster's non-active pool, or “parking lot” (no sponsor). The parking lot gets cleaned out periodically (e.g. annually)
- Consultants can be on more than one roster; and have several co-sponsors
- An “institution” – company; NGO or other source of consultants – is considered as a “consultant,” with a sponsor/co-sponsors

- UNDP staff – e.g., Practice community members – can be considered as consultants, and subject to the same process as outside consultants
- Levels of consultant rosters are:
  - Unit-level rosters (e.g., SURFs; BDP HQ groups; sub-practices; Service Line teams)
  - Bureaux/Clusters' roster (e.g. all BDP; Practices)
  - UNDP's total "federation" of rosters (incl. COs)
  - UN System (in the future; to be negotiated on a case-by-case basis)
  - WIDE
- Unit roster sizes should be manageable (e.g., max about 1,000 per SURF; 50 per unit member)

#### ***D. Consultant Record***

- In three parts, with HR-XML tags.
  1. Actual resume – no special format; subject to free text search
  2. "Fielded" information – two options are allowed, depending on the unit's preference:
    - Minimum information – name\*; e-mail\*; address; phones\*; birth date; gender; nationality\* & citizenship\*(s); languages\*; employer\*; keywords\* (skills; practice areas; expert types); synopsis of qualification features\*; cross-references if cited elsewhere in the knowledge base; rosters joined\* and sponsors\*; special conditions (e.g. fees exceed UNDP level; only flies business class etc.)
    - Standardized resume form, with all relevant information competed on-line using a standard format (e.g., modified "P11")
  3. Performance/work history
    - Work history maintained, based either on feedback from clients, updated by consultant, or in future automatically on notification from ERP that consultant has been hired
    - Feedback comments – roster manager notations from feedback sessions
- Multiple resumes documents can be attached to the consultant's single record – e.g. to emphasize relevant characteristics to the unit; different languages.
- Institutions have equivalent fields to individual consultant – e.g., capability statement replaces resume, etc.

- One record per consultant, containing the information from all rosters the consultant is on.
- Other templates:
  - Self-entry screens, for consultants and institutions
  - Search screens: free text search; advance search allows search on fielded information; concept search (e.g., find CV's similar to another consultant); widen search to other rosters or to higher roster levels.
  - Search results screen: name; select record (both resume or fielded info choices); synopsis of basic info; roster(s); sponsor(s)
  - "Profile" templates, to forward to client
  - Feedback template – standard question set (for phone call notations)
  - Roster administration messages – form letters etc.
- Keywords:
  - Which vocabulary/ies to be used is to be determined; depending on a thorough review of options and Verity search engine capabilities.
  - Self-entry applicants are limited to five skills fields; vetters can add up to five more.

### ***E. Processes***

- Sourcing – continual, pro-active sourcing of new talent should be an important role for all unit members, and the roster manager should help facilitate this (scanning networks etc.)
- Applications – self-service; e.g., consultants contacting a unit can apply through the unit's website, and after preliminary vetting (pre-screening) obtain an access password, and complete their own application forms. Alternatively, consultants can be entered by the roster manager. To avoid duplicity of entries and records, a new consultant will be queried on all the rosters.
- Much of the data entry done by roster manager for the fielded record (minimum information) – could be automatically uploaded by the Verity indexing engine's scan of CV.
- Vetting – No mandatory process, but sponsors must have sufficient comfort level to be able to vouch for the quality of their consultants. Inputs can be reference checks, referrals from trusted colleagues, interviews etc.
- Accessing roster data - two basic permission levels for requesters:

- For UNDP units - access to full record; requesters can contact either the sponsor or the consultant directly
  - For external queries - access to profile only (modified to remove name and contact information); requester contacts country office or head of roster's unit
- Recommending for assignments – when the unit gets a query or a TOR, roster manager does a search in consultation with sponsor, and sends selected profiles to client. Client does the rest (ascertains availability; contracting). TORs received should be maintained under a separate database.
- Feedback – following a referral, or after the completion of an assignment (when known), sponsor or roster manager follows up with client by asking the requesting officer for the best person to provide a feedback interview. The interview should consist of a 10-minute telephone call (using a standard question set) covering how the service was (e.g., whether a candidate was selected) including a 1-5 performance rating; and if selected, how the consultant performed (notations only; no rating). For consultant performance, the interviewer notes positive results for the record, and informs the sponsor. If the interviewer is unsuccessful in reaching the client, the notation field should record “not yet carried out”.
- Negative feedback – If performance is not positive, the interviewer's notation only records the names of the interviewer, interviewee and date of interview, and leaves the notation field blank. The interviewer should alert the sponsor, who should carry out further investigations “off-line” with the client and the consultant. A blank notation field in the consultant's record is a sign that a prospective client should check with the interviewer or sponsor before selecting that consultant.
- Resume and record updates – done by consultant as self-service option, or as a periodic exercise by roster manager
- Quality assurance – RCA of sponsor incorporates feedback on performance of his/her consultants.
- Consultant relationship management – sponsors should cultivate a relationship with their consultants, scheduling briefings/debriefings on assignments; visits, calls, contacts at professional association or network meetings; adding to newsletter mailing lists, etc. Roster manager should facilitate.

## **F. Metrics**

- Performance parameters should be established for:
  - Service levels – referral turnaround time (3 days); service quality rating; acceptance rates (proposed consultants are selected)
  - Website performance – 25 seconds for a satisfactory search result; polling question on website screen (“please rate the quality of your experience”, with optional comment field)
  - Search precision – percentage of search terms matching the categories in the keyword list
  - User demand – growth in first-time users; frequency of use by repeat users; users going directly to database versus requests to sponsors; analysis of user demographics (countries and regions)
- Incentives for sponsors:
  - “Bonus” if your consultant is contracted (e.g., frequent flyer miles?), with annual recognition for highest “earners”.

## **G. Some rollout considerations**

- Four stages:
  1. Starting solution - immediate (consensus on system features)
  2. Full rollout ready (beta version) – est. October
  3. Version 1 ready – est. April 2004
  4. “Ideal” is ready – est. October 2004Annual improved versions thereafter
- From starting solution to full rollout:
  - Obtain the ET’s mandate for this team to establish the UNDP definitive standard (Steve Glovinsky)
  - Provide orientation to roster units, and help them assign roster manager roles, including addressing workload issues (Steve – for BDP)
  - Data clean up of the Knowledge Connection roster – first in NY and then for each SURF (Martin Backlund in NY; SURF roster managers)
  - Obtain resources for migration tasks (Steve – for BDP)
  - Units assign sponsors to their rostered consultants (unit roster managers)
  - Create HR-XML fields; design screens and data models (Francisco Simplicio)
  - Establish the keyword lists to be used (to be determined)
- From rollout to version 1:
  - Units have the option to keep existing rosters, but add XML tags to their records so that parallel records can be uploaded to new system

### 3 – The challenges

The "12 ½ labours of WIDE" are a set of the major challenges faced by quality referral services and the answers addressed to each one of them by WIDE's platform's roster management functions. The "12 ½ labours of WIDE" were identified throughout the process of the reengineering of WIDE that started with a workshop held in New York, in November 2002.

#### 1. *How to deal with the diversity of rosters and why*

- Why so many different rosters?
- Is there a way to improve cooperation in roster maintenance?
- How to consolidate roster management good practices?
- Is there a way to share and protect the investment (money, work and data)?
- Why so many diverse platforms?
- How to build upon experience on roster management?

Starting Solution	Rollout	Version 1	Ideal
Partnership to pursue the ideal solution			
Building upon Wide reengineering efforts			
Phased progress – new versions up to ERP			
Shared investment			
Consolidated basic Roster Management functions	- Agreed basic set of functions - Pilot and refine common solution	Full set of RM functions	

Risks	Mitigation strategies
Starting solutions too close to ideal	
Resistance – "not-made-here" syndrome	

#### *Issues raised and discussed among the group*

##### Group One:

- No trust (too many broken promises)
- No commitment to corporate solution
- Management decision needed
- Should be better than the old one
- Possibility to migrate without losing data: unlikely transition
- Make existing fosters XML compatible

- Cultural resistance “we don’t want to share our experts”
- Introduce a management standard for ensuring quality
- Plan a phase roll-out

Group Two:

1) General Consensus  
Mandate to consolidate org. support  
Resources committed  
Empowered to make decisions

2) Other roster producers exist  
Need to demonstrate value added  
Rationale must be clear

3) ERP integration a long term goal  
no major short term implications

***2 – How to integrate the rosters and still accommodate particular requirements***

- Is it better to have large or small data bases?
- Does it have to be separated or integrated?
- How to accommodate specific data requirements?
- Should it supply data to other databases?
- Can we have access to other databases?
- Can members migrate from one roster to others?
- Can the same expert be listed in different rosters?
- Can recommendations also migrate?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
Federated rosters in single platform			
Migration will be allowed			

<b>Risks</b>	<b>Mitigation strategies</b>

*Issues raised and discussed among the group*

Group One:

Performance: separate Data bases is better  
Business: Feeling of Ownership  
Sharing (Carrots & Sticks of sharing, Business ethics)  
Reconciliation Issue: Sponsors

Group 2:

- Integration requires flexibility

- Quality control – Trade off: the more rosters you integrate, the less quality you have

Integrating all kinds of resources

- preliminary step before entering an expert to avoid duplication (of matching fields): name, email, nationality

### **3 – Why to create common data standards and how**

- How can we compare different resumes?
- How to map competencies?
- How can we exchange data?
- How can we preserve the data collected?
- How can we preserve the investment on collecting data in face of future innovations?
- How to facilitate the reuse of provided data to the members?
- How to evaluate quality based on diverse presentations?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
HR-XML			
			HR-XML editing tools
Making the adoption of the standard as "unnoticeable" as possible			
			HR data interchangeable with other solutions

<b>Risks</b>	<b>Mitigation strategies</b>
Resistance	
Particular requirements	Extensions

*Issues raised and discussed among the group*

#### Group 1:

- Minimum basic field as automated as possible
- Minimum entry (name, add, phone, email)
- Synopsis
- Keywords
- Regional country experience
- Roster Owner
- Sponsors
- Cross Reference available

#### Group 2:

- Sufficient Standards
- Extensions: UNDP – Officially approved?
- Competency mapping (internal UNDP)

Group 3:

- Standard format: Text field
- Do we want to compare?-technical competence
- set of fields should be mandatory +uniform+CV

**4 – How to use taxonomy for the skills sets**

- How to focus a roster on specific areas of skills?
- Is there a common way to describe skills, qualifications, experiences or competences?
- How to facilitate the matching of the right profile?
- How difficult is it to change a taxonomy strategy in the future?
- How to ensure common understanding in describing skills? (e.g. languages)
- How to facilitate comparison of different competences in the search for the right expert?

Starting Solution	Full rollout	Version 1	Ideal
Free description			
	Concept search		

or

Starting Solution	Full rollout	Version 1	Ideal
Extensible table of skills			
Allowing specific taxonomy per roster			
Establish basic taxonomy		Support taxonomy management	

Risks	Mitigation strategies
Too inconsistent terminology	

*Issues raised and discussed among the group*

Group 1:

External to UNDP – optional  
Internal UNDP

- Sectorised skills (integration AIDA etc, maintenance if internal X, automated mapping maintenance)
- Practice (sub-practice or service line?)
- Expert type (sm. List)

Group 2:

3 layers: 1) practice, 2) sub-practice 3) Keywords. Through these 3 layers free text search through CV

Expert chooses the keywords, and then reviewed/approved by the R.M.

Periodic review for adding new keywords

Group 3:

- keyword list too complex - requires modification for consultants and Country Offices, but it's important to have it available
- Relying on free text insufficient
- is technology intelligent enough
- Suggest experts modify CVs
- concept search important, but judgment

**5 – How to establish membership criteria**

- Is there a common set of criteria?
- Should we have a membership agreement? (rights to hold and give access to data of members? Certifying of true and complete information?)
- How to evolve judgment with practice?
- How to face reactions of turned-down registrations?
- How to promote consistent roster quality?
- Should we make criteria explicit?
- Should we make criteria public?
- Should we include companies? (or just non-profit institutions?)
- Should we mobilize participation pro-actively?
- How to share subjective judgment?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
Each roster holds its own criteria			
Criteria is shared			
Full responsibility of the Roster Manager			
Roster Manager vets candidate			
Updates are vetted			

<b>Risks</b>	<b>Mitigation strategies</b>

*Issues raised and discussed among the group*

Group 1:

- Consultants have to have a sponsor in order to be in the membership criteria
- Levels of membership:

- 1) drive through
- 2) parking lot
  - 2.1 Junk yard (bad job)
  - 2.2 fast lane (certified consultant.)
  - 2.3 middle lane (average. Roster member)

Group 2:

- 1) Different Tiers depending on quality of references (The higher the level, the better the reference):
  - SURF
  - Practices
  - UNDP
  - UN
  - WIDE
- 2) Recommender necessary
- 3) Institutions ok
- 4) Feedback from clients

Group 3:

Common set of criteria (minimum), explicit, but not public (to avoid the perception that we only hire friends and people we know)

Include: Companies (consultancy firms), translators, speakers, resource persons, facilitators

Roster manager coordinates the process

***6 – How to manage the resume Self-Service entry***

- How to ensure adequate data quality?
- How to guarantee adequate security?
- How to promote updating?
- How to transfer to the members the data entry tasks?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
Full independent self-service			
Roster Management veto			
Email notifications			

<b>Risks</b>	<b>Mitigation strategies</b>
Spam e-mail: Should we e-mail members?	Voluntary membership
Members with no mail	Fax?

*Issues raised and discussed among the group*

Group 1:

Management of data: multiple registrations

Group 2:

If verification is still necessary, what is the value added or time saved?

Security-password

Update – automated reminder

Consultant? Which roster to enter into?

- should not be an open registration but rather invited
- A common “blurb” which tells the consultant that he/she is in a common roster, rather than an individual roster

Group 3:

- invite only self-service (password protected)
- public self-service, register for roster, message with instructions
- simple self-service D.E.

**7 – How to manage recommendations**

- How to ensure the quality of recommendations?
- Should we keep a roster of recommenders?
- Who should be allowed to recommend?
- How to share the recommendations data entry task with the recommenders?
- How to improve comparability of recommendations?

Starting Solution	Full rollout	Version 1	Ideal
Networked recommenders			
UNDP+BDP level recommenders			

Risks	Mitigation strategies

*Issues raised and discussed among the group*

Group 1:

- Comfort levels trust
- No roster of recommendations
- Keep the parking lot
  - Difference between recommendation & referee
- Recommender is a member of a unit or the unit itself

Group 2:

- Recommendations are important: they facilitate the judgement and selection of the expert

- Quality: coming from somebody trustworthy: someone from within the UN system:
  - Sponsors
  - Feedback
  - Recommender
  - Outside recommendation (outside UN)
  
- Standard form: not that he's good-not enough
  - The job he/she has accomplished
  - His/her experience, where did he/she excel
  - For which organization
  - Team leader/team player- Roster of Recommenders

Group 3:

Recommendations (mandatory or optional)

- internal- known quantity (LDAP, name, title, unit)
- external- known quantity or unknown quantity (not given credence in vetting)
- solicited self-service (internal)
- Roster manager option for entry

**8 – How to manage queries and referrals**

- Who should be able to query?
- Who answers requests for referrals?
- Who should contact members?
- Should we follow-up referrals?
- Should we protect members' privacy? (e.g. e-mail, address)

Starting Solution	Full rollout	Version 1	Ideal

Risks	Mitigation strategies

*Issues raised and discussed among the group*

Group 1:

- Client Onion (surfs, country offices, UN system, Academia, Private sector)
- Any UNDP staff should query...But certain fields are hidden
- No external access yet
- Every roster will be different
- Referrals should be followed up through phone calls, notes..
- Clients contacts members/CVs
- Designated SURF staff responds

Group 2:  
Intranet

- Access by anybody within UNDP
- Answers to referrals – depends on the Roster Unit
- Privacy:
  - data available (contact info & CV info) to all UNDP
  - feedback info – NO (only to Roster manager)
  - recommendation info – YES
- Follow-up referral
  - service-RU
  - assignment
- “forcing function” + incentives → HU and RU
- Contact members - anybody

Group 3 :

Two levels of query:

- 1) Clients 1<sup>st</sup> – 1) Summary: General access to all (should have a summary of person) – member privacy: yes
- 2) Manager 2<sup>nd</sup> – 2) Detailed:
  - o Link email of roster manager
  - o Roster management unit
  - o Who answers referrals? – management unit
  - o Clients should contact members for availability and any other further negotiation

**9 – How to manage communication with roster members**

- What is the best way to communicate with members?
- Is e-mail enough?
- Is there an easy way to manage e-mail? (dynamic sub-set of members)
- Who should be able to initiate communication?
- Who is accountable?
- Should we share it?
- How to share communication templates?
- What are the best ways to mobilize members?

Starting Solution	Full rollout	Version 1	Ideal
e-mail messages			ERP – CRM
Responsibility of roster manager			

Risks	Mitigation strategies

*Issues raised and discussed among the group*

(Plenary discussion)

- sometimes several messages, sometimes need phone call, sometimes no interest any more
- communications: SURF should send out message to consultant and also check availability before referring (Kathmandu does that)
- send out email to short list
- personal touch: phone
- if always availability keeps being checked but job is not promised so relationship to consultant might get soured..
- Personal touch is good but workload needs to be considered and balance found between personal touch and workload
- Question of how to build relationship with clients
- Cory: availability not most important thing, you could send newsletters etc. to make them feel that they are part of something.
- Good idea to invite consultants to pass by SURF when they are in Beirut or other respective city
- TOR to be captured? Bangkok: TOR classified by theme, country and function. Have guidelines for drafting TOR

**10 – How to ensure security**

- How to protect the database?
- Should there be a full-time roster manager?
- Should we work with dispersed teams?
- How to distribute the roster manager functions to teams?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
Constant security monitoring and development			
Roster Manager tasks distribution			

<b>Risks</b>	<b>Mitigation strategies</b>

*Issues raised and discussed among the group*

(Plenary discussion)

- shall roster manager be full time roster manager? What time are we talking about?
- Beirut: might happen that 45 CVs come in during one week
- Steve: data work or screening or what is most time consuming?
- Lina: do not believe in self-service, you have to do most of the work
- Johan: relationship bldg. most of it, more than admin.
- Roster management function takes most of time (Dakar)
- Agreement: needs someone to facilitate relationships

- Minimum functions: Data entry, verification, search referrals, relationship building., updates
- Beirut: division of tasks (works well)
- Screening remains to be done by specialist even if roster manager hired
- Cesar: difficult that all would be done by one person, would need to be divided among several people
- Roster manager: research function or referral businesses
- Core issue: financial
- Beirut: screening not priority, asks for updating CVs took almost a year because individually written to
- Data entry (mechanical), cataloguing (conceptual), work with policy adviser
- As much work as possible should be on consultant him-/herself
- Roster management (relationship bldg, work with policy adviser) versus roster administration (resume management)

**11 – What are the adequate Terms of service**

- Who will provide support?
- What is the reasonable access availability?

Starting Solution	Full rollout	Version 1	Ideal

Risks	Mitigation strategies

*Issues raised and discussed among the group*

(discussion in plenary)

- Performance matrix: Search terms used?, how is search limited?
- How much slower would corporate system be? What is acceptable?  
We should not put unrealistic conditions. What is realistic? 25 sec.?  
Has not be measured yet for corporate solution.

**12 – How to track the request performance**

- How to prove quality of reports? (Informal notes)
- Should we confirm referrals?
- Is there a standard/format for referrals?
- How to encourage feedback?
- How to maintain meaningful feedback?
- What to do with negative feedback?
- Should we follow-up referrals?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>

<b>Risks</b>	<b>Mitigation strategies</b>

*Issues raised and discussed among the group*

Group 1:

Phone call: preferred contact mechanism (customer relationship issue)

Satisfaction rating with roster

Follow-up phone call: standard set of questions (1- rate our service; 2- rate the consultant) this could be also be done with a form to be filled in online (with levels from 1 to 5) with optional comments

2 ways: a) periodically (every three months?) b) request tracker (automated e-mail reminder)

Who should do the follow-up? Ideally the sponsors. But unrealistic. If someone else at least sponsor should be notified. And the roster manager could do it. (the requester could decide who would do the assessment of the performance)

Confidentiality (validation issue, liability issue) – tell client his comments will not be recorded. If negative comments, one should get ok from Res Rep before including them. (question) Feed-back from consultant? (not discussed by group). Negative feedback: blank box left. SURFs can access full comment. Blank means that there was negative feedback.

Comment: lot of negative comments by consultants how they are being managed. What to do with that? Whole other field to be thought about. 2 ways of feedback to be considered.

Group 2:

Follow-up referrals

- Service rating (email) because phone call too time consuming, anonymous to anonymous is better (1-5)

- Consultant performance: phone call with notes necessary – fed back to roster. Filling out evaluation form (competency and evaluator)

No solution for negative feedback

- "call me"
- phone negotiation
- legal implications
- hidden form
- delete

No formatted requests

- minimum requirements (TOR, profile, time, qualifications) but not formatted
- Referrals should have minimum standards

Group 3:

Follow-up service (referral)

No solution for people who do not want to provide feedback

Send box and ask them to rate consultants and send email to SURF

If good relationship to expert, he can provide feedback

Form to follow up on referrals:

Sometimes consultant highly recommended by ie ResRep, but does bad mission. Question to think of, why did he do a bad mission? How can you judge? (maybe no TOR..)

Phone not so reliable, where do you store feedback?

**12 ½ - How to migrate data from existing databases**

- How can we build upon existing work?
- How can we make the most of the existing data?

<b>Starting Solution</b>	<b>Full rollout</b>	<b>Version 1</b>	<b>Ideal</b>
Convert to XML			
Invite members to update			
Implement other 12 decisions			

<b>Risks</b>	<b>Mitigation strategies</b>

*Issues raised and discussed among the group*

(discussion in plenary)

Database will be referred to countries. Data clean up necessary before migration. Each office does its own clean-up. Country offices responsible for their experts. Information will be sent unformatted to countries. Where will actual CVs be stored? Database necessary. What to do with CVs on knowledge connection? Who is going to delete them? Accountability needs to be clear.

Who is part of team that can do referral? Agreement that current rosters not working well. Information not public as long as working process not finalised.