



About the Global Information Management Functional Team (GIFT)

As agreed in OCHA’s change implementation process, each core function of the organization was requested to form a Global Functional Team. For information management and analysis, the Global Information Management Functional Team (GIFT) became operational in early 2019.

Under the leadership of the Information Management Functional Lead, the GIFT serves as a mechanism to bring together expertise from across OCHA, with the aim of improving functional excellence in information management.

The GIFT supports the Functional Lead in “shepherding” the IM Function, including through defining priorities for the function through the Strategic Planning process, developing policies and guidance, collecting best practices, building capacity, communicating organizational direction and ensuring joint accountability for the performance of information management work at HQ and the field.

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1. GIFT: State of play

A year into the creation of the Information Management Global Functional Team (GIFT), much progress has been made in setting up the GIFT as a cross-functional working group devoted to setting out priorities and identify working areas for the group to collectively advance. IMB has created a GIFT Secretariat tasked with coordinating the work of the GIFT, leveraging its potential by ensuring that each participant contributes her/his skill set and knowledge of OCHA and information management, and ensuring the work done by GIFT members is on track and delivers tangible outputs.

The GIFT is organized around core workstreams and is mandated to look at strengths and weaknesses in each thematic area and to formulate solid recommendations to OCHA's management on how to improve each area of work. By doing so, the GIFT supports the IM functional lead in seeking excellence in the way OCHA provides IM and analysis services to the humanitarian community while ensuring that internally IM activities are carried out in a coordinated, governed, predictable manner - both in the field and at HQ.

By setting out clear priorities, generating new ideas, approaches and solutions to the way information is managed within OCHA, the GIFT seeks to standardize best practices, facilitating discussions and analysis around all functional areas that Information Management ultimately underpins - from coordination to advocacy, fundraising, preparedness and response.

At an IM *Community of Practice Event* in Berlin in 2018, the following 3 areas were prioritized for the GIFT to take forward as its first tasks:

- Develop new standards/requirements for newly recruited IMOs
- Address diversity in the IM community, notably gender in the field
- Develop comprehensive technical and quality standards to enable consistent, high-quality data, products and information services in the field and HQ

A year later at the workshop, the first three working groups were asked to share not just the outcome of their work, but also their lessons learned from the working methods they respectively adopted, communications tools used, consultations undertaken. The Secretariat felt this would benefit that newly created groups as they come together to dive into their respective workstreams.

Connecting the dots

Within the GIFT, all working areas are organized organically, incrementally and in a way such that they complement each other and build on the work done by existing work streams in a sequential manner.

To support and validate this approach, the GIFT has agreed to cluster its work around three core areas, under which working groups would be folded:

1. **IM Vision** - comprising of IM analysis, situational awareness, preparedness and evidence-based decision making.
2. **IM Standards** - comprising of visual, software and digital standards and a strong governance model for each area.
3. **Human and financial resources** - comprising of gender and geographic diversity, skill sets identification, virtual IM roster, OCHA core budget for IM tools and services.

GIFT

IM Functional Lead • Secretariat

IM STRATEGY

RESOURCES

IM STANDARDS



About the Workshop

The workshop brought together 32 colleagues across functions from HQ and field operations to develop and institutionalize standards, systems and good practice for global level information management and analysis. It offered a dedicated space to gather lessons learned and best practices in information management in both sudden onset and protracted emergencies. Specifically, participants were encouraged to share their technical and operational expertise with their peers and contribute those in a facilitated manner.

The workshop started with validating the work of three groups, active since February 2019:

- A. Visual and software standards
- B. Gender and geographic diversity in the IM community
- C. Skill sets and competencies for newly recruited IMOs

The GIFT gathered into three new working groups focusing on critical areas that GIFT members and the IM functional lead agreed to prioritize:

- A. IM vision, analysis and situational awareness
- B. Digital governance
- C. 3Ws

The group also identified other issues that should be addressed as a matter of priority.

Resources



[GIFT page](#) - [Workshop page](#)



A short video highlighting the works of the GIFT at the worcan be [viewed here](#)

2. Recommendations from the first three working groups

Colleagues who led the work of the first three working groups presented their main findings, progress to date and recommendations for GIFT members to validate. These recommendations will be presented to the IM functional lead for his endorsement, so he can then bring them to the attention of OCHA's senior management.

Summary of findings

WG 1: Visual and software standards

Team leads: *Noel Victorino and Robert Colombo*

Team members: *Noel Victorino, Craig Williams, Joel Opulencia, Nick Imboden, Alam Khan, Sandeep Bashyal, Rashmi Rita, Sameer Al-Rubaye, Kudakwashe Mhwandagara, Alain Ouattara, Janet O'Callaghan, Francis Tchassem, Albert Abou Hamra, Roberto Colombo Llimona, Suzanne Connolly, Audrey Janvier, Bassil Al Eter*

The group undertook extensive consultations within the IM community, including through an in-depth survey. Colleagues agreed on the following while continuing the work around standardization and provision of templates and SOPs.

Working assumptions and issues at stake

1. OCHA IM standards have become outdated and they are not aligned with our corporate visual identity and with new product we are producing.
2. Technology, data and processes have evolved at a fast pace and we have not been able to adapt our working methods to those.
3. Let's take stock of what we do well, and improve that, rather than starting something completely new.
4. Process, data and analysis are not part of the scope of work of this group. Looking at data quality standards and what products are best suited for analysis will be tackled at a later stage.

Key findings and next steps

The group has undertaken extensive consultations within the IM community, including through an in depth survey. Colleagues agreed on the following:

- A. Standardize our use of the OCHA brand and existing templates (*in progress*)
- B. Update our guidance for IM products in the OCHA catalogue (*in progress*)
- C. Establish a baseline of standard software packages that all OCHA offices can use (*in progress*)
- D. Comprehensive and standardized OCHA templates for all IM products (*in progress*)

- E. Establish a minimum product catalogue (*to be done*)
- F. Continue using this WG to ensure quality control over basic IM products and that standards and templates are continuously updated (*in progress*)

Main products identified as needing standards

- 3W
- Humanitarian Dashboard
- Funding products
- Interactives/BI products
- OCHA core maps

Recommendations and next steps

Action	Counterpart
3W review and standardization	Dedicated GIFT 3W working group (in progress)
OCHA branding project - consolidation of outcome	DMU/OAD
Funding templates standardization	DMU/OAD/HFRMB
Updated mapping styles and templates	DMU/OAD
Develop clearer visualization guidelines	DMU/OAD
Update snapshot template	DMU/OAD
Update humanitarian dashboard	DMU/OAD/APMB
Develop access snapshot template	DMU/OAD/PB
Standardize minimum OCHA software package	WG
Establish minimum software package: <ul style="list-style-type: none"> ● OneDrive/O365/Teamsites/Excel, Powerpoint, PowerBI, Outlook ● Google drive/suite ● Sheets ● Kobo ● Skype (personal) ● Tableau ● ArcGIS ● Illustrator (Adobe suite) 	WG + Budget work stream since tools like the Adobe suite are costly but essential to every office

WG 2: Gender and geographic diversity

Team leads: *Eva Vognild and Albert Abou Hamra*

Team members: *Rashmi Rita, John Marinos, Alain Ouattara, Eva Vognild, Albert Abou Hamra, Ana Maria Pereira, Yakoubou Mounkara Oumarou*

This group focused on diversity in the IM community, notably gender in the field (about 23% female) and geographic diversity at HQ (about 20% non-Western European and Others Group - WEOG).

While the group aimed to analyse IM recruitments in the past one or two years in terms of gender and geographical diversity, the task proved difficult due to limited availability of recruitment data. For this reason, the next phase of the work of the team will focus on working closely with HR colleagues to retrieve such data and undertake in-depth analysis.

Methodology and issues with available data

This working group focused on identifying the root causes for gender and geographic unbalances in the IM community, and propose solutions to address them.

The group tried to analyse IM recruitments in the past one to better understand root causes/obstacles and to find out where diversity has been achieved and how (for instance, through extensive outreach, mentoring, etc).

The group, however, was unable to receive any data, information or statistics on recent IM recruitments. This drastically limited the amount of evidence and data the group would have needed to make solid recommendations, so ultimately the results of the survey and the consultations conducted are at present the main basis for this group's recommendations.

This is why as immediate next step, it was agreed that staff in the Information Services Section will work closely with the group to gather and analyse all existing data on recruitments in 2019. The group feels it is critical to gather data from functions other than IM, to be able to assess whether the unbalance affects other job families as well (HAO, PIO).

Key findings and next steps

1. Lack of data and accurate numbers on recruitment is an issue (e.g. if we look at national staff or international staff). Things become even more difficult with the delegation of authority where at the field level recruitment is managed by every individual office. ***The group is working with HR to collect empirical data so as to support appropriate recommendations.***
2. With regard to the number of female applicants – national vs international – the numbers change drastically. This means that the main issue is with international recruitments, where very few women apply for IM jobs, therefore deeper analysis needs to be conducted on the reasons

for this. ***The group is gathering data from HR in this regard to formulate appropriate recommendations.***

3. Does OCHA allow IMOs to access job families other than IM? (such as HAO, DhoO, HoO, etc..). ***The group will dedicate more time to this topic in the next few weeks and come up with concrete recommendations.***
4. Many female national staff would welcome the opportunity to become international staff but often either administrative procedures don't allow it, or female candidates are not provided with the necessary information and therefore opportunity. ***The group will work with HR to ensure appropriate and formal information is provided systematically to all staff in this regard.***
5. Gender and geographic diversity are not mutually exclusive but often pose a challenge when a hiring manager is unclear about which one to prioritize during a recruitment.
6. Lack of diversity cannot be fixed without a good internal mobility scheme and clear direction from the management – which one is the priority? Gender or geographic diversity? In a single recruitment they can become mutually exclusive. ***The group will request an update on OCHA's mobility policy framework.***
7. There are clear bias towards IMOs – an IMO profile is often intended as a 'technical profile' without sufficiently fact-checking the soft skills she/he may already have, which would allow her/him to move across functions (e.g. in management and middle-management positions)
8. Recruitment should always be accompanied by large outreach efforts - this will help us ensure a larger pool of candidates from different nationalities and backgrounds. For instance, social media has proved to be a good way of attracting qualified and diverse candidates. ***The group took note of IMB's Diversity Action Plan and will reach out to all OCHA work units - HQ and field - seeking the adoption of a similar plan.***

WG 3: IM profiles and skill sets

Team leads: Elizabeth Marasco and Nadia Hasham

Team members: Nadia Hasham, Elizabeth Marasco, Noel Victorino, Kashif Rehman, Kashif Siddiqi, Reem Nashashibi, Yakoubou Mounkara Oumarou, Adepero Temilade Oladeinde, Shahrooz Badkoubei, Mame Khary Diop

Working assumptions

There is a recognition that there are evident gaps in the existing IM job profiles (in some cases, staff perform tasks that are not reflected in the JD) and in the skills available to us (that we are either not recruiting for or upskilling). For IM to play a more prominent role towards achieving situational analysis and awareness, it is critical that new skill sets are identified and embedded into our workforce.

The group has identified and researched four core skill sets as potential building blocks towards more comprehensive job profiles. Feedback by the group was critical to inform the next steps.

1. COORDINATION	
Rationale	Feedback
The group put emphasis on <i>soft skills</i> that are needed for career advancement and for IMO's to be able to access management roles	Already being done by staff; this profile should be combined with some measure of hard technical skills when creating a JD

2. HYBRID ANALYST		
Rationale	Feedback	Issues
<ul style="list-style-type: none"> <input type="checkbox"/> IM no longer as service provider but part of the thinking process <input type="checkbox"/> Combination of business specialist and traditional data analyst skills 	<ul style="list-style-type: none"> <input type="checkbox"/> Situate discussion within situational awareness/analysis <input type="checkbox"/> Consider making a more evident link between IMO's and HAO's, especially when this type of expertise is needed for analytical work - e.g. around anticipatory financing <input type="checkbox"/> This profile has potential for career development for both IMO's and HAO's and by extension, might help us bridge part of our diversity gap <input type="checkbox"/> Staff should "socialize" approach to hybrid analyst role in their respective offices – e.g. brief colleagues and HOO 	<ul style="list-style-type: none"> <input type="checkbox"/> Skillset is ambitious, may be difficult to find national staff with this profile <input type="checkbox"/> Regional offices could be a good place to cultivate and find this skill set <input type="checkbox"/> Consider a data scientist profile (including predictive analytics, etc.), leverage knowledge of predictive analytics in the Hague <input type="checkbox"/> Understand and predict partner needs is critical <input type="checkbox"/> What do we mean by "analysis"? We need to be clear <input type="checkbox"/> How do we find people with these skills? <input type="checkbox"/> Upscale skills with current IMO's – examples of how to select, mentor, and train those who are motivated, perhaps send to workshops <input type="checkbox"/> HoO can integrate into PHP and development plan

	on the findings, progress, suggestions from the GIFT (get involvement and buy-in)	<input type="checkbox"/> Interim JDs are important – can help identify individuals
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3. DATA VISUALISATION	
Rationale	Feedback
<input type="checkbox"/> Combination of mapping and visualization skills <input type="checkbox"/> High demand and production of infographics rather than reports <input type="checkbox"/> Most mappers do and/or can learn viz easily <input type="checkbox"/> Could HAOs do it so IMO's can focus on analytical parts	<input type="checkbox"/> Consensus on skill set <input type="checkbox"/> Consideration that this might require more specialized skills: advanced GIS, access related GIS for internal use, etc.

4. CONTENT MANAGEMENT	
Rationale	Feedback
<input type="checkbox"/> CM is about digitizing the way we share and disseminate what we produce <input type="checkbox"/> CM is essential as we have core corporate platforms to maintain in good shape for reputational reasons	<input type="checkbox"/> Focus on standards and consistent processes <input type="checkbox"/> This is not a stand-alone skillset, as based on the size of each team, backup is needed to maintain platforms <input type="checkbox"/> There should be at least one focal person and one backup for CM in each office

Recommendations and next steps

GIFT members endorsed the updated skill sets identified by the group, and agreed to incorporate them into IM job descriptions. Given that changing generic job profiles is a lengthy process, involving other entities of the UN Secretariat, the group recommended to:

- ❑ Draft JOs encompassing the newly identified skill sets
- ❑ Build capacity of existing staff around these skill sets through training and coaching.
- ❑ Ensure that each IM unit has a balance of the identified skill sets.
- ❑ Upgrade the TORs of IM units so as to encompass roles such as content management and analysis.
- ❑ Ensure that all skill sets described in the new JOs are sufficiently flexible so as to adapt to the needs of different types of OCHA offices and settings:
 - Large vs small
 - Protracted vs sudden onset
 - Country vs regional
 - Small vs large budget
- ❑ IM functional lead and OAD to:
 1. Review, and if agreeable, adopt the newly drafted JOs
 2. Seek better alignment between IMO and HAO profiles
 3. Discuss ways of ensuring stronger analysis capacity in each field office (along the lines of the hybrid profile).
 4. How to upskill current staff
 5. Prioritize analyst profiles for new recruits and rosters

3. New working groups kickstart their work

Prior to the workshop, based on the list of topics that GIFT members had identified and agreed on last year, the IM functional lead proposed to address the following themes:

- A) IM vision, analysis and situational awareness
- B) 3W - purpose, audience and standards
- C) Digital platforms review

GIFT members had been asked which group they wanted to part of, and the three newly established teams kickstarted their work throughout day 3, 4 and 5.

WG 4: 3W - Scope, audience and standards

Team leads: *Nick Imboden and John Marinos*

Team members: *Rashmi Rita, Umar Abba Yusuf, Aung Pyae Phyoe, Husam Eldin Ali, Joseph Addawe, Murtaza Sayed, John Marinos, Nick Imboden, Darya Sagaydak, Noel Victorino, Florence Nyambura Muchori*

The group, which is focusing on the purpose, audience and standards of 3W, identified the following areas in-need of work:

- 1) **Scope and definitions.** Provides understanding of purpose, common understanding of terms
- 2) **Stakeholder analysis (SA).** Provides comprehensive understanding of which stakeholders need what, when, for which decisions.
- 3) **Workflow processes and relationships.** This translates into well-defined and documented, standardised yet context-adaptable processes and workflows with global buy-in and appropriate expectations, integrated across clusters and with other coordination processes.
- 4) **3W data.** It defines well-defined and -documented interoperable data structures, definitions, methodologies, standards, and related QA processes.
- 5) **Products.** It outlines a catalogue of easy-to-use, adaptable-to-context, standardised templates, static products and interactive visualisations, as well as analytical products based (in part) on 3W data, meeting demand from identified clients and used by them for decision-making.
- 6) **Data Management Tools.** These are Interoperable, easy-to-use, adaptable-to-context, standardised tools for data collection, management, sharing, [visualisation - see below], with universal availability, buy-in and use.
- 7) **Guidance.** Comprehensive, detailed, standardized guidance documents are needed, incorporating the hows, whys, whens of the entire 3W process (data, tools, products, relationships, workflows etc.), in any context.

WG 5: Platforms mapping and governance

Team leads: James Kunjumen and Adrian Ciancio

Team members: James Kunjumen, Adrian Ciancio, Florentino Urriola, Christian Flamm, Andrej Verity, Abdifatah Subow, Muditha Sampath Henadeer, Kenny Chung, Marina Colozzi

Over the past years, OCHA has tested various digital platform governance structures and lacked an understanding of the true breadth of platform activities across the organization. For this reason, the group will recommend a lighter, cross functional and more flexible governance solution with stronger participation from field. The aim is to encourage innovation while providing key services and a standardised framework for cost-effective development and maintenance of OCHA platforms.

Vision

- A more **streamlined, collaborative organization** that promotes and fosters digital innovation, especially from the field, while providing organization/corporate level solutions through best practices.
- A more unified, coherent, recognizable and strong **digital brand**.
- Management has thorough oversight and understanding of our digital platforms and landscape and thus can make **informed decisions**, especially with regard to priorities and resourcing.
- A strong **digital governance** which while ensuring consistency, coherence and best allocation of resources, fosters innovation, professionalized solutions and provides an ongoing platform review process.

The group aims to work around three core streams and principles:

- ❑ **Professionalized solutions:** assist innovative and custom applications to apply standards and best practices, and aim for scaled, enterprise-level systems across the organization
- ❑ **Platform reviews:** critically look at the large amount of platforms OCHA manages in various forms, providing feedback and recommendations to property managers as to what we should continue doing as an organization, what we should retire, and what we should improve. This while providing ongoing guidance on both regular (light) and on demand (in depth) review for new products and their related processes
- ❑ **Encourage innovation:** provide low-cost, largely ungoverned digital space for the field to test, so as to foster innovation across OCHA

Focus areas

The main focus areas that the group feels will require dedicated, in depth attention in order to professionalize the way we, as OCHA, manage digital platforms are:

- ❑ Content management
- ❑ Data interoperability and standards
- ❑ Enterprise architecture

Expected outputs

What	Who
Establishment of a governance body with aim to start on Q2 2020	GIFT with EMC endorsement <u>Note:</u> The governance body will include GIFT members with strong understanding of digital platforms and stakeholders needs, and will take into account lessons learned from past governance models
Development of data standards for OCHA platforms	GIFT Platforms working group
Innovation hosting & supported hosting	GIFT Platforms working group
Expand developers COP to include field developers	IMB with support from GIFT
Develop a catalogue of existing platforms, map interactions and identify potential duplications and efficiencies	GIFT Platforms working group
Proposal for taxonomy harmonization	GIFT Platforms working group
Establish one core document repository for OCHA as a whole to achieve harmonization / single-source / best publishing practices (reports, maps, infographics and other public documents) and minimize maintenance work on key platforms	GIFT Platforms working group

WG 6: IM vision, analysis and situational awareness

Team leads: Luigi Nicoletti and Robert Colombo

Team members: Luigi Nicoletti, Kashif Rehman, Tarek Elgebely, Faizal Thamrin, Sanjay Rane, Albert Abou Hamra, Alam Khan, Nadia Hasham, Majed Abuqubu, Yakoubou Mounkara Oumarou

The group agreed to adhere to SO2 to establish a baseline vision for information management in OCHA:

→ **More credible, comprehensive, and evidence-based situational awareness.**

The group will therefore focus on two areas:

- A. A common IM vision and outlined strategy across OCHA.
- B. More credible, comprehensive, and evidence-based situational awareness.

The group discussed the two areas and what it would take for the organization to achieve them.

What does this translate into?

1. The UN system, based on the New Way of Working, has become more situationally aware with the aim to improve response and preparedness.
2. Stakeholders use OCHA evidence for decision-making.
3. OCHA services and data are digital, interoperable, and scalable.
4. OCHA facilitates and provides value added analysis and insights to the operational environment we work in.

Working assumptions

- The current system is not entirely suited to the needs of the current environment. Current analysis does not produce insights that match audience requirements in a timely manner.
- IM underpins OCHA’s humanitarian response activities and enables a collaborative and integrated working environment.

Issue	Possible solution
At present, IM is not included in conceptualizations, planning and decision making	Improve situational awareness processes and clearly define OCHA’s role in it
We don’t have standardized processes and tools to do situational analysis	Securing the role of IM in a whole of office approach
We are often stretched in terms of capacity and externally pushed	
We face a fairly low level of consultation between HQ and field	Establish knowledge management
Career development (??)	
Financial constraints on tools and services	Developing strategic partnerships
Lack of governance (whole of office)	

4. Newly established working groups

The workshop integrated two panel discussions into the agenda with a view of providing an overview of the state of play, priorities and main challenges both in sudden onset and in protracted emergencies.

The discussion was lively, rich in ideas and perspectives, and ultimately allowed participants to identify areas that need to be prioritized and addressed by the GIFT if IM and analysis is to be advanced in OCHA.

Main assumptions GIFT members agreed on:

- **We need to standardize the way we work.** While we do have templates and guidance at our disposal, this is not systematic and does not apply to everything we do and produce. We also lack proper governance around use of basic tools and services - something the iPor tried to supplement - and this can pose challenges - from reputational risks, to inadequate use of existing talent and expertise, to misuse of the limited resources and time at hand.
- **We need to standardize the services we provide** - both in sudden onset and protracted emergencies. This will help us deliver more predictable, reliable IM services to clear, identified stakeholders.
- **We need to standardize the resources at our disposal.** There are big discrepancies in the amount of human and financial resources available across OCHA's offices, divisions and branches, and mostly because we don't work against a streamlined package of minimum services we are expected to provide.
- **We need to be able to manage and access our knowledge.** There was consensus around the urgent need to bring back a knowledge management workstream in OCHA which would work across functions to collect basic knowhow, templates, guidance, best practices and lessons learned which OCHA colleagues can access at anytime. This would help us address some of the core issues identified here - from lack of consistency in the products we produce, to scattered used of existing templates, etc.
- **Work as one OCHA, think as one OCHA, budget as one OCHA.** We need to stop thinking of the services we provide as delivered by individual branch or offices and rather think of us as an OCHA-wide pool of resources. This has two main ramifications:
 - From a budget perspective, the GIFT would like to explore the possibility of developing a new model whereby instead of budgeting for IM tools and services – whether software,

digital infrastructure, etc. – as individual work units, we could elevate this budget to the level of an organization-wide budget. The funds would be distributed across OCHA based on capacity, needs, expected outputs and managed by a governance body.

- From a human resources perspective, alongside the new surge deployment mechanisms which recently replaced the ERR, the GIFT would like to support the creation of a virtual roster - organized by function and skills - which can be used to provide additional, much needed support in the event of a sudden onset emergency.

Next steps

The workshop report and executive summary will be shared with the GIFT membership, key stakeholders within OCHA and OCHA's management. An all-GIFT call will review the results of the workshop and ensure adequate capacity and representation in taking the new tasks forward.