TOOL

REPORT OF

QUESTION-AND-ANSWER SERVICES

WORKSHOP

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AMSTERDAM, 21-22 MARCH 1994

CONTENTS

Colophon

Workshop organised by TOOL, The Netherlands

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1. INTRODUCTION

The workshop for European Question and Answer Services (QAS) organised by TOOL in Amsterdam on 21-22 March 1994, followed up an earlier meeting (1990) in Great Britain. The intention of the workshop was to share experiences and opinions on the future of QAS's and to ascertain areas of potential cooperation between the participating organisations.

The workshop was attended by 32 persons from 23 organisations in Europe operating a Question and Answer Service. Five European countries were represented. Regretfully a number of invitees from other countries were unable to attend. The programme of the workshop is presented in appendix 1; for a list of participants and invitees see appendix 2.

One of the charms of the workshop was the heterogeneity of the organisations represented: some participants work for large international organisations such as UNIDO and CIRAD, whereas others operate a one-man show. In between these extremes a number of middle-range organisations were found, some having a separate QAS department and some integrating the question-and-answer work in the rest of the organisation's activities. The exchange of ideas and experiences between such dissimilar groups was a rewarding exercise.

At the same time it was not always easy to find common ground. The structure and needs of the various organisations being quite different, discussion tended to linger on a general level. Nonetheless agreement was reached on issues of future cooperation.

This report is set up as follows. The introductory section includes an overview of the workshop proceedings. Section 2 is devoted to the results of the discussion of main issues affecting QAS's today. Section 3 presents the results of the discussion on three themes which took place on Tuesday morning. Conclusions with regard to cooperation between participating organisations are contained in section 4, whereas section 5 includes the resolutions.

The presentations made on the first day by representatives of participating organisations are not included in this report. One reason is that not all participants made a presentation. Another is that information of this nature can easily be requested from the organisations involved.

Opening speech by Rutger Engelhard (director TOOL)

Mr Engelhard opened the meeting with some introductory remarks on issues facing developing organisations today. These form the context and to some extent the agenda of question-and-answer services. First of all, the basis for development cooperation in The Netherlands as well as in other countries of Europe is eroding. In view of this situation, it is proper that development organisations join, coordinate their work and make efforts to increase its quality.

Changes in the work field have induced a major policy reorientation by TOOL, and it may be of interest to consider them more closely. Countries of the South have undeniably witnessed a rapid increase of expertise in the past decade, and are less dependent on technology transfer from the North. In addition, development organisations have come to recognize two facts: first, the existence of a large amount of dormant expertise in the South--local knowledge and technology which is unknown and unavailable to a larger public; and second, the fact that technological problems faced by organisations in the South may be more appropriately addressed by southern than by northern expertise. In view of these changes, TOOL has decided to shift its focus. Instead of concentrating on the transfer of technological knowledge from the North to the South, TOOL now stresses South-South information exchange and the uncovering of dormant local expertise. In this new process TOOL feels it has a *facilitating* role to play.

However laudable the goal of exchanging information between countries of the South may be, it is not easy to achieve. One important impediment is the lack or deficiency of communication channels. Example: it is often easier to communicate between the neighbouring countries Kenya and Uganda via London, than it is directly.

The hope is expressed that the QAS workshop would critically reflect on the role of question-and-answer services in a changed and changing world. The workshop should also consider possibilities to further coordinate question-and-answer services, reducing the incidence of double work.

Overview of the QAS workshop

The QAS workshop commenced on *Monday morning, 21 March 1994*. Following the opening speech and the fixing of the agenda, the minutes of the 1990 meeting in Rugby, Great Britain, were discussed and accepted. The morning session was devoted to presentations on QAS activities of organisations represented in the workshop. These presentations set the scene and provided material for the rest of the workshop.

The first part of the afternoon session was spent in taking stock of issues affecting the operation of QAS's today and grouping them. Five main topics were distinguished and discussed in smaller groups. The results of the group meetings were presented in a plenary discussion at the end of the afternoon (see section 2).

After dinner participants were invited to the TOOL office for a demonstration of the TOOLNET E-mail system.

On *Tuesday 22 March 1994* the participants were again divided into three groups, each of which discussed one theme which had come forward the previous day (see section 3). The results of the group discussions were subsequently presented and reviewed in a plenary session.

After lunch TOOL summarized the results of the recent evaluation of its Question-and-Answer Service (see appendix 4). Points of consensus with regard to cooperation between organisations participating in the workshop were then discussed. Practical issues following

from this were lastly dealt with. After an evaluation of the workshop (see appendix 3), the workshop was formally closed.

2. ISSUES AFFECTING THE OPERATION OF QUESTION-AND-ANSWER SERVICES TODAY

During the Monday afternoon session, issues confronting QAS's today were voiced and grouped in five topical clusters. The five topics were (1) the clarity of questions posed, (2) the quality of answers, (3) developments in the relationship between North and South, (4) the financing of QAS and (5) cooperation between European QAS's. Subsequently the participants were divided into three groups, each of which discussed issues it thought most relevant. Topics (1), (2) and (3) were tackled most. The discussion is presented below in a schematic manner. The issues mentioned in the plenary session are listed first, followed by the remarks made in each of the discussion groups.

Topic 1: the clarity of questions posed to QAS's

Issues mentioned in the plenary session
- location-specific information is often necessary for an answer
- does the question reflect real need of end-user?
- vagueness of question
- methods for information requests
- more specific questions are often also more difficult to answer

group 1
various kinds of questions may be distinguished:
- specific questions
- general questions (two possible responses: a tester to make the question more specific, or a letter saying sorry, can't answer it)
- question refers to a field in which QAS is not specialized--referral to other organisation
- questions requiring interdisciplinary discussion

group 2
- if a question is unclear, all QAS's indicate that they make efforts to improve clarity (ask for additional information)
- some organisations have developed a standard form to pose questions, none reject questions in which the form has not been used.
- general questions are replied to by all groups in a general way: sending general information, lists of references and publications.
- emphasized that a *personal* reply is important.
- many QAS's have a network of regular clients, people and organisations who repeatedly make use of the QAS. One could say that there is a kind of dialogue. This ties up to the previous point on the need for personal contact.

- questioners rarely follow up on an original question by asking new questions (on the same topic)
- important to realize that *vagueness* is a relative issue: the question may be absolutely clear to a person in the local surroundings, but not to a foreign QAS. Therefore it is the interpretation which causes difficulties.

group 3
- distinguish general from specific questions
- work with local organisations rather than with individuals
- use criteria/guidelines in assessing questions (why the question, social impact, end-users)
- be clear about the profile of the own organisation
- training on 'how to formulate a question' to development workers and local organisations

Topic 2: the quality of the answers provided

Issues mentioned in the plenary session
- expertise in the South is often not sufficiently used
- it is difficult to receive feedback on the value of the information provided
- quality control
- repackaging of information
- evaluation of QAS
- speed of response
- how to include local information and grey literature into answer
- answers require an integration of technological information and social/economic/anthropological facts
- linkage of answers to requirements of sustainable development
- what information resources used (data banks, etc.)

group 1
- speed of response is a very important aspect of quality
- what are the criteria used for handling enquiries (in various phases of the question-and-answer life cycle)?

group 2
Some methods to improve the quality of answers are:
- evaluation forms (only 1 out of 3 is returned)
- second opinion before sending the answer
- panel-answers (a group of experts discusses the best solution)
- increase the speed of reply by distinguishing various categories of questions (simple to difficult)
- annual review of answers provided, in order to assess quality.

How can it be assessed whether a question has been posed before (another time/place):
- scan own database
- coordinate databases?

group 3
- question-and-answer and technical inquiry services form two ends of a continuum
- quality indicators:
  - do you receive a follow-up question
  - define response rate
- Quality can also be ascertained by carrying out evaluation missions in the field (organised either by the QAS or by colleagues from e.g. the project department).

Recommendations:
- do not refer general questions to other organisations
- give questioners a number of alternative answers

Topic 3: Developments in the relationship between North and South

Issues mentioned in the plenary session
- expertise in the South is increasing
- there is an increasing number of local QAS's
- most information is still in the North
- distribution of publications is generally easier from the North
- communication South-South is increasing
- discussion North-South should be continued

group 1
Questions could be redirected to southern QAS's, making use of a database on QAS's (to be established) containing information on expertise, documentation, methodology.
Difficulties in redirecting questions are e.g.:
- competition between organisations
- the fact that some QAS's charge for answers
- reliability of contacts
A database on southern QAS's could be established by northern QAS's jointly.

Another way in which northern QAS could co-operate is in sharing questions and answers (working groups on topics).

Thirdly, an inventory could be made of how questions are presently being dealt with by northern QAS's (life-cycle of questions).

group 2
- local information services work well in some regions, but not in all (Africa for example)
- expertise in the South is not only increasing, it is being increasingly recognized (see point 1 above)
- better communication will mean that local knowledge can be better made use of.
- experience with on-line data bases: not a panacea (even a danger in some cases of sending absolutely irrelevant information), but useful on occasion.

group 3
- work with local organizations
- identify local organisations and stimulate the setting up of QAS's
- exchange information
- provide adequate training for the personnel of local QAS's.

Topic 4: The financing of QAS's

Issues mentioned in the plenary session
- should information be free of charge?
- dissolving of QAS's as separate units within organisations
- questions should generate profit for the organisation
- finances presents a limit to growth of QAS
- political platform (to uphold support for development cooperation in general, and subsidies for question-and-answer services)
- less funds are available for northern organisations

This topic was not discussed by the groups on Monday afternoon, but was dealt with the next day (see section 3).

Topic 5: Cooperation between northern QAS's

Issues mentioned in the plenary session
- regionalising QAS's (several organisations participating in the workshop are in the process of doing so)
- access to answers provided by various QAS's
- redundancy (to prevent double work)
- should the wheel be reinvented?
- steps towards cooperation
- networking (on national level or with like-minded organisations)
- how can we learn from each other

This topic was not discussed by the groups, but was taken up the next day (see section 3).

3. THREE CORE THEMES

Three themes were distilled from the discussion on the first day of the workshop and fed into the second day proceedings in order to provoke debate. The participants were again divided into three groups, each of which was given a question to discuss. It was emphasized that the groups should focus particularly on the way in which northern QAS's can cooperate.

The three questions/themes were:
1. In order to promote the development of southern QAS's, what joint steps could be

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taken by northern QAS's?

2. How can the funding of northern *and* southern QAS's be assured?
3. How can northern QAS's cooperate to improve the efficiency and effectiveness of their work? Options:
    a-   specialization of northern QAS's
    b-   prevention of double work (reinventing the wheel)
    c-   standardization.

Question 1: How can northern QAS's promote southern QAS's?

Conclusions of group 1
Why do we want to promote and develop southern QAS's?:
-    to bring questioner and response closer together, and
-    to encourage development in the South.

Whatever one wishes to do in this field, funding is a prerequisite. Another issue is whether it is better to create general QAS's in the South, or specialized QAS's. Then, the problem is often encountered that answers from the South have less 'status' than answers coming from the North. Finally, it is important to reflect on the future of northern QAS's if QAS's in the South are promoted.

What steps should be taken in the promotion of southern QAS's?
i.   Define and describe ourselves clearly (to know who can best facilitate the founding of specialized QAS's in the South).
ii.   Choose to cooperate with other northern QAS's.
iii.   Strengthen southern partners with whom you are already working together first, by establishing a proper training programme and providing them with tools.

Plenary remarks

Question: Shouldn't the basic principle be that northern QAS's strive to become redundant in the long run?

Answer: This is the official policy of all our organisations.

Question: Isn't continual backstopping of southern QAS's necessary?

Answer: No, then we haven't provided them with sufficient tools.

Remark: One can't just say out of the blue: "We want to set up southern QAS's." One should look for concrete initiatives to which we in the North can link up. Without a local initiative, efforts won't be successful. One should start with *talking/discussing* with southern partners, *listening* to what they really want.

Remark: When organisations say that they want to set up a QAS, one still has to assess whether they have the capacity to do so and if there is a market for their services.

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Remark: We should start with countries in which an initiative to start a QAS has been taken.

Remark: As the South becomes stronger, the balance between South and North changes. This also affects the mandate for northern QAS's.

Question 2 How can the funding of northern *and* southern QAS's be assured?

Conclusions of group 2

With regard to charging for question-and-answer services the following remarks were made:
- charging can be done indirectly (via e.g. SNV, CTA etc.)
- the principle should be: solvable institutions should pay whereas answer services for poor individuals should be free.
- it is not likely that charging the users will cover all the costs of question-and-answer services.
- users could also pay for question-and-answer services with other services (payment in kind).

Options for funding northern QAS's are:
- subsidies from the government (problem: not possible in all countries)
- transfer of funds within an organisation (e.g. the project department subsidizing QAS)
- charity
- private funding (companies and private donations)
- charge the user.

Southern QAS's can be funded by:
- charging the user (in this case northern QAS's also must do so)
- funding by northern QAS's.

Plenary remarks

Question: Have northern QAS's ever worked together in applying for funds?

Remark: In the early days of CD Rom, CTA brought producers of databases and major donors together to discuss possibilities of the new medium. This meeting resulted in new funding. This might be an idea for QAS's as well, to get together with donors.

Remark: The problem is that QAS's have no way to evaluate the results of their activities and tell funders about their effects. QAS's need research results.

Remark: Underlines that it would be good if everyone would charge for their services. This is absolutely necessary if southern QAS's are to have a chance.

Remark:	Doesn't agree. Public libraries in Holland are also free of charge. Information has to flow, and to flow it has to be freely accessible. Public money in the North should also be made available for QAS's in the South. This is what CTA is doing.
Remark:	Why should information be free? CIRAD charges for its question-and-answer work.
Remark:	If a tailor-made answer is desired, the questioner should pay for it.
Remark:	The costs of a QAS have to be covered--this is quite different from wanting to make a profit. Charging a fee has another positive effect as well: users make better use of something they have paid for.

Question 3: How can northern QAS's cooperate to improve the efficiency and effectiveness of their work?

Group 3
To improve the efficiency and effectiveness of our work, various steps could be taken:
- setting up of organisation profiles of northern QAS's, including their strengths/weaknesses/resources/databases.
- setting up of profiles of partner QAS's in the South.
- E-mail conferences. The question is: who will manage the conferences.
- exchange of information on toolkits used by QAS's, such as their databases, human resources, forms, procedures etc.

The group felt that there should be no sharing of questions received or answers given between QAS's in the North. Standardization of procedures was also not felt relevant.

Plenary remarks
Question:	Isn't double work being carried out if a question is sent to two QAS's which both make efforts to reply?
Answer:	If a questioner decides to send a question to two QAS's, there is no reason for only one to formulate an answer. Let the questioner him/herself decide which answer is the most relevant to his/her needs.
Question:	If a question regarding your own field of expertise reaches your QAS, do you answer it yourself or also pass it on to others?
Answer:	It would be good if the question was also passed on to QAS's in the South.
Question:	Group 3 has also made a choice *not* to cooperate in various ways.
Answer:	Checking out questions with other organisations is not useful, as each question has a different nature.

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4. CONCLUSIONS REGARDING COOPERATION

The following general conclusions regarding cooperation between northern QAS's were reached:

1. Cooperation between northern QAS's will focus on referral of enquiries and exchange of information on the own organisation (further cooperation will take place on a voluntary basis).

2. It is useful to develop organisation profiles of northern QAS's.
    The profiles developed for the 1987 GATES meeting could be updated for this purpose. The UNIDO profiles are a useful point of reference.

3. It is useful to develop organisation profiles of important partner QAS's in the South. The organisations in question must be asked if they want to be referred to.

4. E-mail communication between northern QAS's may be useful.
    TOOLNET is a good starting point.

5. It is useful to exchange information on question-and-answer procedures followed by the various services. Good cases of question-and-answer could be exchanged. A special workshop could be organised on question and answer procedures.

5. RESOLUTIONS

The following resolutions were adopted:

*   TOOL will develop an electronic organisation profile form, which will be forwarded to UNIDO for a second opinion. The revised form will subsequently be forwarded to all QAS's with the request to fill it in and distribute it (via E-mail).

*   All QAS's participating in the workshop will identify one or more of their QAS partners in the South, ask them if they can be referred to, and fill in a organisation profile form. The deadline is June 30th 1994. TOOL will coordinate this activity.

*   TOOL will provide every participating QAS with a free one month trial of TOOLNET E-mail.

*   The exchange of information on QAS procedures is left to each of the participating organisations.

Next meeting
Although the participants agreed that another meeting should be organised preferably in 1996, a hosting organisation could not be determined immediately. This will be done at a later date. Various participants indicated that a next meeting should also include representatives from southern QAS's. One option would be for each northern QAS to invite a representative from one of its key partners in the South. CTA volunteered to fund the extra costs involved (transport).

Another suggestion was for a following workshop to be set up in parts which can be attended separately. This would allow for the inclusion of topics which are of interest to some but not all participants.

A final suggestion was to organise special workshops on the use of E-mail in advisory work and on QAS procedures.

Appendix 1

PROGRAMME OF WORKSHOP QAS AMSTERDAM MARCH
21-22, 1994

Monday March 21, 1994

9.00 am   -   Opening speech by Rutger Engelhard (director TOOL)
             -     Fixing of agenda
             -     Discussion of minutes of 1990 meeting in Rugby, Great Britain

10.30 am   Presentations by various participating organisations: CTA, GRET, ILEIA, IRC, ITDG, SKAT, UNIDO, WBSG, WOT and SDTG

2.00 pm   Inventory of main issues facing QAS's

3.30 pm   Discussion in small groups on main issues

evening   Demonstration of TOOLNET E-mail at TOOL office

Tuesday March 22, 1994

9.00 am   Discussion in small groups on three themes

11.00 am   Plenary discussion on themes

2.00 pm   Discussion on parameters of cooperation between Q&A Services
Practical conclusions

3.30 pm   Closing of the workshop and evaluation

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SUMMARY OF TOOL QAS EVALUATION

Conclusions and recommendations

There is less of a match than was previously the case between the kind of requests for advice that are received and the existing TOOL network. This discrepancy can to some extent be remedied by TOOL itself by making intensive use of the library and the other services of the Reference Centre. But there is still a need to identify new expertise and expand the TOOL network.
Given that TOOL itself does not have all the necessary expertise (and does not seek to, either), it is recommended that the emphasis be placed on strengthening and expanding the TOOL network in Holland, Europe and the developing countries. Moves in this direction have already been initiated in connection with the execution of the Implementation Plan, involving the selection of preference countries. But these moves are not enough. Since the advisory service does not apply any geographical restrictions, networks will also have to be created elsewhere.

The quality of the requests for advice still leaves a lot to be desired. For the most part the requests for advice contain little background information and provide insufficient data on the operating parameters. The position of the party requesting advice is not always clear either.
It is recommended that the guidelines drawn up at the end of 1992 be checked against the outcome of this evaluation. The guidelines must enable the party requesting advice to formulate clearer inquiries with more background information, so that the advisory service coordinator can initiate appropriate action.

The norm for the time taken to reply to an inquiry is exceeded in more than half of the cases. There are various interconnected reasons for this - the change in the kind of inquiries received, the lack of expertise within the existing TOOL network and the sometimes unclear priorities, in addition to the understaffing of the advisory service. Fortunately, an additional person was assigned to the advisory service in 1993, and it is expected that this bottleneck will soon have been eliminated.

The above conclusions have consequences for the norm for the reply time. The reply time norm should be adjusted to the changing situation. General inquiries will have to be processed more quickly, while the norm for specific inquiries will have to be extended somewhat (a maximum of 4 months). More time will be needed to deal with microprojects. For both specific inquiries and microprojects a dialogue will have to be initiated between the party requesting advice and the advisory service, and it will have to be made clear that comprehensive, relevant information is needed for adequate advice.

In addition, the system for the registration of requests for advice does not always work satisfactorily. This means that the correct priorities cannot always be established - specific advice is often given in response to general inquiries, although the time available for advisory work is limited. On the other hand, the advisers/organizations make little effort

to obtain more background material from the party requesting advice. Furthermore, the party requesting advice does not always know what falls within TOOL's capabilities and what falls outside.

It is therefore advisable to speed up implementation of the steps to improve the administration of the advisory service (guidelines for the party requesting advice and more accurate registration of the inquiries). This should be done in such a way that a) little time is spent on general inquiries without background information and b) both the advisory service and any experts consulted are more intensively involved in dealing with specific inquiries that meet the guidelines.

The evaluation shows that the registration and filing of the advice given is still unsatisfactory. A more systematic approach is called for.

Fewer inquiries are coming from the Western/Dutch organizations and more from the target groups themselves. It is impossible to deduce from the figures whether this is a coincidence or a new trend. But it is a fact that fewer people are being posted overseas in the context of development cooperation, since knowledge and expertise in the developing countries themselves is expanding. It is therefore not surprising that fewer inquiries are being made by (potential) development workers. It is advisable to focus more on the representatives of the target groups and to mobilize and create networks of experts on the spot. Both the Consultancy Sector and the advisory service of Reference Centre can act as catalyst here - under the Implementation Plan many contacts are being established with organizations in the developing countries. As TOOL's name becomes better known more organizations will make use of TOOL's services, and these organizations can in turn be included in the TOOL network if they have specific expertise. But it is essential that TOOL's mode of operation be demand-oriented as far as possible.

In the majority of cases specific advice is given. This can be in the form of specially selected literature and/or relevant addresses in Holland/Europe/developing countries. TOOL's Reference Centre and in particular its library play a crucial role here. It is advisable to further increase the capability of the Reference Centre, particularly as regards the setting-up of networks of experts in developing countries, on-line links with other reference centres, the keeping up-to-date of address files and the compilation of information on firms and courses for entrepreneurs, etc.
This recommendation is neither confirmed nor contradicted by the field research. There is evidently a demand for more specific information from as many sources as possible and for up-to-date information, but the parties concerned do not wish to lose the contact with TOOL.

Given the present mode of operation and the kind of requests for advice received, it is not axiomatic that technical experts should be sent overseas and/or microprojects formulated by the advisory service. If, however, in the case of specific inquiries a much more intensive relationship develops with the party requesting advice, then more possibilities will open up in the above-mentioned direction. It is, however, important here not to lose sight of TOOL's objectives, to fix priorities and to assess the possibility of financing beforehand, otherwise the party requesting advice will be encouraged to entertain expectations that it will ultimately be impossible to meet. The results of the field research

show that there is interest in an arrangement whereby technical experts would be made available on short missions. But the parties concerned have indicated that they would be unable to bear the full financial consequences.

Constant attention needs to be paid to the quality of the advice. This applies first and foremost to the technical aspects. In a number of cases in the random sample the advice was judged to be poor by the specialists. Moreover, too few alternatives were suggested. In the context of TOOL's professionalization it is necessary that the advice given should be in the "satisfactory" to "good" range. It is advisable to arrive at concrete, businesslike agreements with the organizations and advisers regarding participation in the TOOL network. To this end it will be necessary to develop criteria for both the participation and the advice. The random quality control to which advice is subject will have to be applied more consistently than has been the case so far.

The quality of the advice needs constant attention in terms also of the gender and environmental aspects. These aspects will have to be brought more explicitly to the attention of the parties requesting advice and the advisory service, as well as the advisers and the organizations. It is recommended that gender and environmental aspects be included in the proposed guidelines. In addition, the organizations and the individual · advisers should have their attention regularly drawn to lacunae of this kind in their advice. The symposia and meetings on specific themes organized by TOOL are good opportunities to create awareness and expand knowledge in these areas. These do not, however, constitute sufficient conditions for a change in behaviour. It is advisable to arrive at concrete agreements with the organizations and advisers and to take businesslike steps if the agreements are not adhered to.

There is a certain lack of uniformity in the presentation of the advice. To create more clarity for the parties requesting advice, this aspect will have to be given the necessary attention by the organizations and the advisers, as well as by TOOL's advisory service. It will have to be made clearer that they are operating under the TOOL flag and that this means certain quality standards.

The results of this self-evaluation indicate that no changes are required in the policy aims of the Implementation Plan as such. What does, however, need more attention is the operationalization of this policy. The methods of operation of the advisory service, the organizations and the advisers involved, as well as the agreements between the advisory service and the organizations and the advisers will have to be adjusted on the basis of the above conclusions and recommendations.
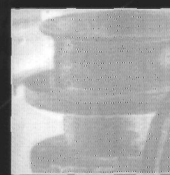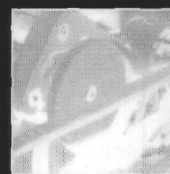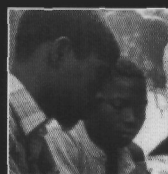
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TOOL facilitates communication and technology transfer through TOOLNET, a multi-functional international e-mail network. This technology network interlinks local organisations and field workers active in small-scale development projects, technological institutions, international development organisations, consultancy agencies and individual technical experts in both the South and the North.

TOOL is a non-profit organisation.

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