ERA-MORE

European Network of Mobility Centres

Quality working group 2005

Recommendation to network members

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Introduction

The setting up of the ERA-MORE network was based on a bottom up approach where each country defined a national strategy according to the needs in a given country. The challenge is now to integrate the diverse national structures into a European network that fulfils one common basic mission: information and assistance to researchers and their families in all matters related to funding opportunities and a relocation in another country. It must be ensured that a researcher receives the same level of quality information in all 200 Mobility Centres in 32 countries. Therefore, in addition to the basic common understanding of our task, as outlined in the "Declaration of commitment", other quality criteria are necessary.

The working group on quality issues was created in March 2005 with the mission to have a look into the quality of work performed by the national networks and each individual mobility centre and to make suggestions to the whole network on how things can be improved and made more coherent throughout ERA-MORE.

The members of the working group met three times in 2005 and discussed issues like helpdesk applications, quality of information, liability, evaluation of services, satisfaction of researchers with the work of the Mobility Centres and performance indicators. The meetings were based on exchange of current practice and the intention was always to produce tangible results in the form of recommendations, sheets or examples of good practice.

This output was disseminated at the Bled annual conference in the three workshops related to quality issues where the ideas of the group were mainly confirmed and complemented by other experiences. The main recommendation of the Bled quality workshops was to define a common set of performance indicators that each Mobility Centre should provide at regular intervals. This recommendation was approved by the bridgehead organisations and will be implemented in the course of 2006.

In order to fully exploit and disseminate all results of the work, the group decided to publish the outcomes of its work performed in 2005 in this format. We hope that the booklet will be helpful for the colleagues in the Mobility Centres for their daily work.

The members of the quality working group

1. Good practice examples for ensuring the quality of information & limiting the risk of liability charges

The primary aim of this chapter is to provide national ERA-MORE officers with some general guidelines on how to put in place quality standards and how to deal with the liability of the dissemination of information.

A first look will be taken at quality procedures (A), after which liability aspects and good practises of limiting liability are discussed (B).

1A. Ensuring the quality of information

As information providers, ERA-MORE mobility centres face issues of quality with respect to the information they provide. It makes sense to subject the information provided to a set of defined quality standards in order to limit the possibility of incorrect information being provided. We can distinguish two different processes which both ask for their own approach: the collection of information and the dissemination of information.

Collection of information

There are different ways to ensure that the information is collected in a proper way thus limiting the margin of error.

Good practice examples:

- Accuracy in source selection

- Close cooperation (possibly through the establishment of privileged contacts) with competent Ministries (especially in the case of Bridgehead Organisations) and regional authorities (in the case of Mobility Centres) to enhance the information flow and to solve problematic cases;

- Facilitate networking between Ministries and Bridgehead organisations and Mobility Centres;

- Ensure a coherent information flow between Ministries, Bridgehead Organisations and Mobility Centres;

- Secure legal expertise either by employing lawyers/legal experts in the network or by subcontracting legal experts for checking the coherence of information and for solving difficult cases;

- Bind reference material on legal issues (such as compendium, guide, directory, vademecum) for Mobility Centres staff, to ensure within the network a coherent level of knowledge of the staff and information given to the clients. This is especially of interest for countries with several Mobility Centres.

- Secure direct access to legal acts (databases, official journals, mailing lists);

- Provide information to the staff on how legal acts are implemented in practise. Again, checking this with your network contacts of the competent authorities is recommended.

- Promote cooperation with other actors in the same field to exploit complementary expertise (i.e. Marie Curie Fellowship Association);

Dissemination of information

When looking at dissemination of information you should be aware that there is a difference between (a) official information, (b) information that is not (yet) confirmed by the authorities and (c) information which is not compliant with the official sources.

(a) Official information	(b) Grey area	(c) Contradicting official information
Ideally we disseminate information that comes from an official source. If we can use the official information without adding anything to it, and if we add the source of the information, the quality of the information is at its best. However, often information coming from official sources needs to be re-written so our readers will understand it, or simply the information needs to be translated into English.	When the information is not based on an unambiguous version provided by an official authority, the situation becomes more complex. Take, for example, a letter to an institution from a regional tax inspector in response to a question from the institution. It may not always be possible to apply one situation to another seemingly similar situation. And in situations where one regional institute interprets the rules more strictly than another, on which criteria should the mobility centre base its information? It is also possible to imagine a situation where new legislation or a change in the rules is in the offing. How should we provide information in this situation? There is a significant grey area that time and time again will require an interpretation of the situation.	Then there is also the question of whether information that is not in line with the official version can be distributed. For example, imagine that in the country someone needs to renew his/her immigration papers, but that in practice it is not a problem if he/she stays for only a month after expiry of the permit. What do we say then? Is it customer-friendly to make them aware that renewal is not really necessary, or should we always stick to the official story? And what if the enquirer asks about this? Should we discourage it? Or give no opinion?

Good practises to ensure a high quality of disseminated information

- charge professionals with translations and get these translations checked by the competent authorities (one can sell this as mutually beneficial cooperation). When disseminating written information, add to the information that the translation has been agreed on by the competent authorities (state the name of the authorities);

- when distributing information that has come from an official source, it is good practice to have the official source review any fact sheets or summaries that are prepared using that information. For example, a fact sheet explaining entitlement to an unemployment benefit could be submitted for review to the authority responsible for assessing applicant's entitlement to the benefit.

- state source of information. This is a great way of limiting your liability about this information as you make it clear you are not the owner of the information, but the source is. Also it provides the reader with an insight on where the information comes from. It could add to the reader's trust in the information.

- State when the information was updated. Especially on written information this is very important. Written information can lie around for a while before the reader reads it. If the reader sees that it is a year old, he/she could take steps to find out if the situation has changed in the mean time.

- secure regular updating of information;

- avoid interpretation of law;

- do not publish information which is not compliant with the official information. At best we can provide hints when the actual practice is not in line with the official sources during personal contacts with researchers to guarantee a user-friendly service. In these sensitive cases, liability questions must be considered and taken into account. It is very important to explain what the official line is and to stress that you agree on this official line. It is possible to explain about a practise which in not in line with the official information, however, ALWAYS say that you leave it up to the client but that you agree on the official line.

1B. Limiting the liability of the Mobility Centres for the information it provides

Even with high quality assurances in place, there are no cast-iron guarantees that the information provided will be error-free or that it will not be misinterpreted. The mobility centres could be held liable for any harm or other adverse consequences that may arise from these eventualities. Apart from putting some form of quality assurance in place, it is therefore advisable to investigate how liability can be excluded as far as possible.

One obvious measure is stating the source of the information. Where possible, the source of the information could be included. This measure is a logical step following on from the idea of submitting information sheets for review to the original information source.

Disclaimers

Another measure to prevent liability is the use of DISCLAIMERS in all **written** information. Good practise for all written information is to use a web-disclaimer on your national portal and to use email-disclaimer for information disseminated by e-mail, such as answers to helpdesk questions. Furthermore, it is also recommendable to add a disclaimer underneath any printed information, such as newsletters, guides, fact sheets, brochures, etc.

Disclaimers are best written at a national level for two reasons:
1. Disclaimers are closely linked with the national legislation on information provision
2. When designing a disclaimer, it is also important to take into account that every culture has its own way of dealing with accountability of information and disclaimers

It is therefore impossible to suggest one general disclaimer for all Mobility Centres, because according to our experiences, national practice in using them differs in each country and it can be only suggested that each Bridgehead organisation or Mobility Centre proposes a national example. However, it is good practice to have disclaimers published on the Portals written in "pop-up" windows.

Please note that perhaps in your culture it is not necessarily common to use disclaimers; however the service you provide is accessible to researchers worldwide. Incoming researchers, to whom you provide information, might have different views on liability of information and the use of disclaimers.

Suggestion: "This page is subject to a disclaimer" (clickable disclaimer in two languages; English and national).

With 33 participating countries, there are 33 possible versions of disclaimers. This is not uncommon. Many multinationals, which have national portals in the countries where they are active, have a different disclaimer for each national portal/web site. A good example hereof is the website of BMW.

BMW and disclaimers – an example:
The website of BMW, www.bmw.com is subdivided into national web sites, very much like our eracareers network. It is interesting to note that each national BMW portal has its own disclaimer.

Four examples:

The disclaimer of the United Kingdom site reads:
"BMW UK has made every effort to ensure the accuracy of the information contained in this site but does not accept liability for any errors or omissions. This applies in particular where third party data is accessed through this site. Your attention is drawn to the separate terms and conditions displayed by 3rd party suppliers at their respective pages." (http://www.bmw.co.uk/bmwuk/homepage/ - click 'legal notice')

The disclaimer of the Irish site reads:

"This information is provided by BMW "as is" and without warranty of any kind, expressed or implied, including (but not limited to) any implied warranties of merchantability, fitness for any particular purpose, or non-infringement. While the information provided is believed to be accurate, it may include errors or inaccuracies."
(http://www.bmw.ie/ie/en/index_narrowband.html)

The disclaimer of the German site reads:
"Diese Website wurde mit größtmöglicher Sorgfalt zusammengestellt. Trotzdem kann keine Gewähr für die Fehlerfreiheit und Genauigkeit der enthaltenen Informationen übernommen werden. Jegliche Haftung für Schäden, die direkt oder indirekt aus der Benutzung dieser Website entstehen, wird ausgeschlossen, soweit diese nicht auf Vorsatz oder grober Fahrlässigkeit beruhen."
(http://www.bmw.de/de/home/copyright/index.html)

The disclaimer of the Italian site reads:
"La presente informazione viene rilasciata da BMW "qual è" e senza garanzie di alcun genere, espresse o implicite, ivi inclusa, a titolo meramente esemplificativo, qualsivoglia garanzia implicita di commerciabilità, idoneità ad un particolare scopo nonché garanzia di non violazione di diritti di terze parti. Sebbene le informazioni fornite si ritengano accurate, potrebbero contenere errori o imprecisioni."
(http://www.bmw.it/BottomBar/index.php?pg=informazioniLegali)

When orientating on what a disclaimer is and how you can phrase and use yours, it is interesting to do the following exercise:
1. Go to search engine such as Google and type in the word 'disclaimer'. Have a look at some of the examples which pop up. → You will see that it is very common to use a disclaimer. Also you see that most of the time a disclaimer is accessible form the homepage of a website through a click-option.
2. Gather a few information brochures from different organisations. See if you can find anything resembling a disclaimer in this written material.

Conclusion:

This section sets the general guidelines for the ERA MORE Network, for those responsible for every day help to researchers.

Nevertheless, these guidelines cannot by itself ensure high quality of information and limit our liability and accountability, but they can add to our success greatly. As ERA-MORE Mobility Centres and Bridgehead organisations we are collecting and disseminating information to help researchers with their cross-border obstacles. This information can be erroneous or it can be misinterpreted by the receiver, thus causing mishap. In order to reduce the chances of erroneous information provision and reception, we can put quality assurance procedures in place.

Furthermore, our success relies heavily on the quality of cooperation between those involved in the ERA MORE network, such as the Commissions, Bridgehead Organisations, Mobility Centres, National and Local Authorities, as well as with researchers. Such contacts should become a standard practice, through which development and continuous improvement of the information provided can be achieved, and our liability and accountability less questioned.

We hope it will contribute to your success.

2. Good practice examples for answering written questions of researchers

Supporting researchers' mobility means, among other aspects, being able to solve doubts and problems of researchers and their families. It is obvious that the quality of answers provided to researchers is a milestone illustration of the work performed by each mobility centre: it is therefore important to take seriously into account some "steps" when answering incoming queries, in view of being sure that we are providing the best possible service. There are in fact several important issues to be taken into account when drafting a written answer, such as correctness of information, precision, appropriate language, accountability .

For these reasons, some good practice examples for answering questions of researchers and their families have been collected during the Working group meetings on the basis of concrete praxis examples, gathered by the participants:

Before answering a question, it is worthwhile considering the following aspects:
- read the question carefully
- understand the question (if needed, go back to the researcher for more details);
- take the question for serious (even if it looks like a silly question);
- assess the nature of the question and decide if the question can be answered by own resources with existing knowledge or by signposting to a partner organisation;
- dispatch the question, if necessary;
- follow-up of the answer given by a third party to the question;

When you get to the **writing phase** it is useful, also to limit the margin of error, to take into consideration the following good practices:
- in the first sentence of your e-mail, try to rephrase the question to make sure that the researcher knows to which question you provide the answer;
- refer to the national and/or European portals for exhaustive information;
- refer to target group of the Mobility Centres (if question is raised by another category than researchers);
- be careful when phrasing your answers and possibly put a disclaimer in the signature in view of excluding liability as far as possible[1];
- answer in a friendly manner, but formally (i.e. Dear ….), as your answer might be forwarded or shown to official authorities;
- balance level of detail in the answer;
- provide quality links;
- be careful when signposting to other web pages or services;
- provide the answer or at least a holding answer, if the questions proves to be difficult, within two working days;
- make sure that the question is effectively answered (by checking your draft answer against the request);
- share knowledge between bridgehead organisation(s) and mobility centres. . .

Always bear in mind the intercultural dimension of the work in a Mobility Centre.

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[1] On this issue, please bear in mind what has been suggested in the previous charter, in particular at pp.5-6 (dissemination of information) and 7 (disclaimers).

To guarantee a high level of information it is also useful to:
- Circulate answers among your national network
- Prepare templates to be used when answering similar queries
- Create shared databases

3. Good practice examples for Helpdesk applications

Thinking about helpdesks makes you think about troubleshoots, a variety of problems to be solved and intensive customer support by providing tailored information in due time. The customers here are mobile researchers, which usually face a number of mobility obstacles, and most of them need quick and reliable information from the members of the ERA-MORE network, accordingly to the mission of the Mobility Centres.

ERA-MORE is still a new network; nevertheless the visibility of the network is eventually increasing, thus becoming well known to the international research community. Therefore it is expected that the number of requests will increase significantly in the near future. It seems to be necessary to develop tools or methodologies that will facilitate the scaling of the system and prevent overload. The experience so far gave evidence that Web based helpdesks are useful tools towards this direction.

Comparing good practices from different national mobility networks, the ERAMORE quality working group came to the conclusion that for helpdesks under development or to be developed in the future common guidelines or recommendations, mainly based on common sense and experience sharing, would be beneficial.

The first output of this reflection can be found here.

Objectives of helpdesk applications
- create a channel for receiving requests of clients according to a question scheme
- speed-up and improve quality of responses for the benefit of the user
- optimise work process if several persons involved in answering (signposting questions, tracking of requests and answers)
- share knowledge for questions and answers and thus reply in a reliable and coherent way (improved quality)

Benefits for using helpdesk applications
- overview of type and frequency of questions
    - o create FAQ
    - o produce better information
    - o identify problematic areas
    - o update of information
- archive questions and answers
- statistics
- database of clients (for further information or dissemination activities)

Recommended functionalities of helpdesk application
- <u>helpdesk questionnaire on portal</u>
    * recommended compulsory fields:
    - o name
    - o surname
    - o e-mail
    - o sex
    - o nationality
    - o category of employer in the target country
        - ▪ higher education establishment (check terminology)

- - - research organisation
      - industry
      - others, please specify
    - category of question
      - entry conditions
      - visas
      - work permits
      - recognition of diplomas
      - job opportunities
      - salaries
      - taxation
      - pension rights
      - health care
      - social security
      - accommodation
      - day care
      - schooling
      - language courses
      - access to the culture of the host country
      - Intellectual Property Rights
      - Others, please specify
    - field to tick if the person wishes to receive further information or agrees to be in the database of the Mobility Centre
  - * optional fields
    - age
    - phone number
    - position (permanent or temporary)
    - research field
    - request from researcher, family member or third party
    - already in the country or abroad
    - civil status
    - duration of stay
  - * hints:
    - enable multiple choices
    - make the difference between incoming and outgoing researchers
    - questions of data protection to be considered
    - clarify the target group (researchers and their families)
- database of questions and answers with search function (free text and keywords)
- signpost function (attribution of requests)
- follow-up function (tracking of answers and time span)

4. Good practice examples for the use of questionnaires to measure user satisfaction

The number of researchers who make use of the services provided by the Mobility Centres as well as their level of satisfaction are important quality indicators in a process of evaluation: on a local level for a single mobility centre, on the national level for each national network, on the European level for the evaluation of the entire ERA-MORE network. Therefore, a range of minimum standard questions to be used by all mobility centres and all countries involved in ERA-MORE would enable the network to provide comparable data and global statistics.

The feedback received during the data collection can be used for statistics, performance evaluation, to up-date information published on web-sites, to share good practices, to ensure quality control and, last but not least, to prove the need of continuity of the mobility centre activities at the national and European level.

In the same way, the quality indicators, like the complementary quantitative indicators, are a good evidence and very useful and valuable in communication, project management, lobbying and fund raising.

The following recommendations are being put forward by the working group:

- careful preparation of the questionnaire, through the direct involvement of experts (sociologists) and end-users (researchers) in the drafting process
- involve experts, target group, testers prior to the launching
- the mention "confidential" should be marked somewhere in the questionnaire
- if the personal data is intended to be used in a database, ask for permission
- good explanation of objectives is the pre-condition for cooperation from researchers: explain that other researchers will benefit from it as it will be used to improve the quality of the service provided, rather than saying that it is of use for the administrators in a Mobility Centre
- feedback should be gathered about both the national portals and the services of the Mobility Centres (maybe in two distinct questionnaires)
- rating of services should be on a five item scale: two positive, one neutral, two negative, for example:

1	- -	☹☹	Very unsatisfied
2	-	☹	Unsatisfied
3	-/+	☺	Neutral/average
4	+	☺	Satisfied
5	+ +	☺ ☺	Very satisfied

- use qualifying adjectives, such as:
  Was the answer   comprehensive
                        helpful/useful
                        timely

- Recommended questions:
  * How important is the existence of the service? Or Is the service important?
  * How did you find out about the existence of the ERA-MORE network
  * Do you have suggestions to improve the service?

Active members of the working group

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