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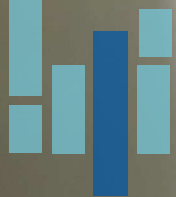
**INTERNAL
OVERSIGHT
SERVICE**

Evaluation Office

EVALUATION OF THE FIRST MANAGED MOBILITY PROGRAMME

Internal Oversight Service
Evaluation Office

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Abstract & Acknowledgements

ABSTRACT

In 2019, UNESCO implemented the first managed geographical mobility programme. The Executive Board at its 208th session requested the Director-General to temporarily pause the programme and for IOS to undertake an independent evaluation. The evaluation focuses on the implementation of the first exercise as well the potential effects of mobility on the availability of high-level expertise and career development prospects. The emphasis is on providing lessons learned and recommendations on the best way forward.

The evaluation concluded that UNESCO should resume the managed mobility programme (MMP). However, the organization needs to address some weak and less effective elements of the MMP's implementation as well as issues of concern related to career prospects. Many stakeholders applauded UNESCO for finally moving forward with an operational and strategic imperative pointing out that a smooth functioning mobility system needs time. However, the evaluation found that the obligation to deliver mobility in a very short time frame generated a compressed timeline, unrealistic deadlines and a feeling of rush detrimental to planning, proper handover processes and support to relocation and transfers. In addition, despite concerted efforts to have clear criteria and steps and follow transparent processes, staff still expressed reservations on certain decisions such as the list of posts not subject to geographical mobility and/or deferments. Furthermore, receiving managers felt disconnected from decisions affecting the composition of their teams and many staff felt their options in the mobility compendium were limited or not fitting with their expertise or career aspirations.

Responding to the main challenges in the first managed mobility exercise, IOS recommendations revolve around: adjusting the timetable in general and the timing for notifications in particular, introducing relocation information packages and mandatory handover processes; involving receiving managers more closely; updating deferment criteria and the list of posts not subject to mobility and exploring the possibilities for additional incentive options linked to career promotion.

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Susanne Frueh

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List of Acronyms

ACPP	Advisory Council on Personnel Policies
ADG	Assistant Director-General
ADM	UNESCO Administration and Management Sector
AIPU	International Staff Association of UNESCO
AO	Administrative Officer
BFM	Bureau of Financial Management
BSP	UNESCO Bureau of Strategic Planning
CAB	Cabinet of the UNESCO Director-General
CI	UNESCO Communication and Information Sector
CLT	UNESCO Culture Sector
CMO	Chief Medical Officer
DDG	UNESCO Deputy Director-General
DG	Director-General
DPI	Division of Public Information
ED	UNESCO Education Sector
EO	Executive Officer
EVS	Evaluation Office
FAO	Food and Agriculture Organization of the United Nations
FO	Field Office
FSC	Division of Field Support and Coordination
GEN	Division for Gender Equality
HQ	UNESCO Headquarters
HRM	Bureau of Human Resources Management
ICTP	International Centre for Theoretical Physics
IIEP	International Institute for Educational Planning
IOC	Intergovernmental Oceanographic Commission of UNESCO

IO	Internal Oversight Service
IT	Information Technology
JD	Job Description
KMI	Knowledge Management and Information Services
MMP	Managed Mobility Programme
MRP	Mobility Review Panel
MSS	Bureau for Management and Support Services
PAX	UNESCO Priority Africa and External Relations Sector
PVE	Preventing Violent Extremism
SC	Science Sector
SDA	Standard Duration of Assignment
SHS	UNESCO Social and Human Sciences Sector
SMRP	Senior Mobility Review Panel
STU	UNESCO Staff Union
TWAS	World Academy of Sciences for the advancement of science in developing countries
UIS	UNESCO Institute for Statistics
UN	United Nations Organizations
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UNICEF	United Nations Children's Fund
WFP	United Nations World Food Programme
WHO	World Health Organization

Executive Summary

Background

The Executive Board at its 208th session invited the Director-General (DG) to request the Internal Oversight Service (IOS) Evaluation Office to undertake an independent evaluation of the first managed geographical mobility exercise. The Executive Board further requested the Director-General to temporarily pause the managed mobility programme and present the results of the independent evaluation at the 209th session with a view to fine-tune the mobility and resume its full implementation.

The objective of the evaluation is to provide an independent assessment, based on available evidence, of the main results of the first managed geographical mobility exercise with an emphasis on providing lessons learned and recommendations on the best way forward.

Before 2019, UNESCO had tried unsuccessfully to implement managed mobility. UNESCO adopted a new managed mobility policy (MMP) in December 2018 as an integral part of the Strategic Transformation process and for UNESCO's full-fledged involvement in the new UN Country teams and UN Sustainable Development Cooperation Framework.

A goal of the MMP is to encourage mobility not only geographically but also between sectors and between sectors and central services. From late 2018 and into 2020, Human Resource Management (HRM) implemented the first geographical managed mobility exercise and moved a cohort of 51 staff members. The largest group were at the P3 level with similar gender distribution (51% male and 49% female).

Findings

Overall, while the implementation phase suffered from a number of problems and weaknesses, most staff and managers believe mobility should be resumed, provided necessary adjustments are incorporated.

Planning

The planning phase involved two main elements: (i) the process of identifying the posts that would (and would not) be included in mobility and (ii) launching the process of communicating to staff the rationale for mobility and the upcoming phases. There was confusion on how the list of posts not subject to mobility was defined. Many provided specific examples of posts that, to their understanding, do not have an equivalent outside of one duty station but which had nonetheless been included as part of mobility. HRM launched the mobility exercise with a communication plan that included diverse types of efforts targeted to different audiences. While some staff interviewed found the communication informative and useful, others found it to be unclear and impersonal.

Deferment

The mobility policy established deferments as a provision for postponing the geographical move of a staff member on personal/medical grounds or operational considerations. The number of deferments granted was high. A majority of staff eligible for mobility availed themselves of the option for personal/medical deferment. Of 185 staff members eligible for mobility, 95 or more than half (51%) sought a personal or medical deferment. Many staff members viewed the large number of deferments as negative for the good functioning of mobility because this decreased the pool of available posts. Particularly in the case of operational deferments, the criteria used by managers to request them was unclear, opening the door for inconsistency from one Office, Sector or Service to another.

Advertisement

The mobility compendium involved 113 posts, including 46 in Headquarters, 62 in the Field Offices and 5 in the Institutes. It combined both occupied (72) and vacant (41) posts but did not include posts of staff who had voluntarily opted-in to the mobility exercise. A total of 100 staff members vied for the 113 posts in the compendium. The mobility compendium was very limited. Many staff had little choice or did not find any suitable posts matching their grade and background and some were compelled to express an interest for posts for which they considered themselves unqualified to perform. UNESCO has a relatively small workforce with highly differentiated areas of expertise. This results in a limited number of positions in the same grade and area of expertise contributing to frustration with the available options for moves.

Review/matching

HRM provided Sectors with a list of staff subject to mobility and relevant posts in the mobility compendium. Sectors reviewed and prepared proposals for reassignment and continuation in post to be taken into account by the review panels. Two panels reviewed the proposals. In almost half of the cases (49%), staff members were provided with their reassignment preference. Some Assistants Director-General (ADGs) and receiving managers considered they had not been sufficiently consulted during the review exercise and that the Mobility Review Panel lacked a full overview and understanding of sectorial and programmatic needs resulting in less than ideal reassignment recommendations.

Decision/notification

HRM delivered the notices of reassignment for staff in July 2019 with an expectation to move to the new posts by 1 October 2019. Staff clearly and unequivocally expressed dissatisfaction with the timing of the notification indicating that the expectation to move in three months was unrealistic and produced high levels of stress and anxiety.

Transfer/relocation

The new mobility policy includes elements for improved staff installation and spouse and family support to ease the transition. However, in many instances, there were long wait periods to obtain answers from HRM and incomplete or inexistent information packages on new duty stations. Interviewees described difficulties in finding information on practical and concrete questions surrounding their moves and feeling alone in the process of understanding conditions in their new duty stations and aspects such as schools, lodging and security.

Career development prospects

Respondents acknowledge that mobility has the potential to enhance their career or the career of staff in general as it promotes learning new things, becoming more adaptive, and gaining new perspectives and competencies, which, in turn, improves future employability. Indeed one of the reasoning of the MMP is that professional growth is more difficult when a person stays for prolonged periods in the same post, with very similar responsibilities and tasks.

The positive perspective of mobility on career progression was more common at the level of ADGs and Directors. At lower levels, some staff advanced the view that mobility would not help or could be detrimental to their career prospects as it would entail working in an area unrelated to their professional field. Others described how mobility, as currently envisaged, appears to lock them into a never-ending process of moves at the same level. Further, others noted that geographical mobility, as it was implemented in 2019, focused on moving people but was delinked to a more holistic framework of talent management. A recurrent theme from interviews as well as in the open-ended responses from the UNESCO Staff Union (STU) and HRM surveys is that managed mobility limited to equal grade fails to play a role in promoting the career development of staff.

Expertise

One core question for UNESCO as a specialized agency rests on the type of workforce required to provide sustained, quality support and advice to Member States. Concerns were raised regarding the potential impact of managed mobility on the expertise and technical specializations of UNESCO staff. Managed mobility programmes, both in UNESCO and elsewhere, involve a shared decision-making responsibility between Sectors and Human Resources. With managed mobility, decisions on when and where to move staff is based on a number of considerations and organizational demands, including burden sharing that are beyond a single focus on an individual's expertise. These 'other' considerations might override the need to have specific expertise in certain places moving it to locations where it is less relevant or not fully utilized.

Perspectives are not homogenous on the consequences of managed mobility on expertise. Some maintain that UNESCO and other international organizations have changed and that whereas before it was possible to have specialists on a large number of topics this is no longer viable. Therefore what is required are effective programme managers who are tuned in to their fields of work and who have access and knowledge to networks and specialists and are able to bring them on board when needed. Others believe UNESCO should pursue some degree of mobility but that for a large number of staff (fewer staff than are currently involved) mobility should be pursued with caution as it means going against their expertise and poses the risk of individuals leaving the organization. Further, staff who are generalists cannot provide the type of specialized support that Member States seek and for which UNESCO has a comparative advantage.

Delivery

Some senior managers, both in Headquarters and in the field, indicated that mobility had not had an effect on delivery or that it had been minimal while others mentioned that it was too early to have a full picture of the consequences of mobility on delivery. A number of managers, however, conceded that managed mobility was having or had had a negative impact through longer than normal vacancies for the posts that were not filled as part of mobility.

With its very tight deadlines, the mobility exercise left little flexibility for handover periods. Particularly in the field, a handover process is necessary for credibility and continuity as the newcomer meets relevant government officials, partners and other stakeholders. Short-term assignments are a possible mitigation measure to address staffing gaps that arise from mobility.

Recommendations

1	Resume an improved MMP
2	Continue to highlight links to strategic transformation and United Nations Reform
3	Review posts not subject to mobility
4	Review the deferment process
5	Broaden involvement in review/matching
6	Adjust timing on decision and notification
7	Facilitate relocation
8	Ensure quality handover
9	Build in career incentives

Management Response

Overall Management Response

The Management would first like to express its appreciation for the comprehensive review on the latest geographical mobility exercise. The recommendations indicate the need for building on and further strengthening the measures in some of the phases. These provide implications to allowing sufficient time for the overall process, and in this regard, the impact of COVID-19 cannot be disregarded, especially for geographical mobility. While HRM stands ready to launch the process, taking into account the recommendations and pending the decision of the Executive Board, it is foreseen that the overall delay will affect the estimated timeline.

Recommendations

Recommendation 1: Resume an improved MMP

This should take into account all of the steps involved in a well-planned geographical mobility exercise, appropriate incentives and relocation support. It should also include a more thorough costing of the exercise and potentially include familiarization visits or training requirements. HRM might want to consider implementing the managed geographical mobility every two years rather than annually, as currently envisaged.

Addressed to: Bureau of Human Resource Management

Recommendation 2: Continue to highlight links to strategic transformation and United Nations Reform

The communication strategy needs to review the most successful modalities from the first exercise and building on these further emphasize the strategic and overarching reasons for mobility- be better able to support countries with Agenda 2030, and be an active participant in United Nations reform.

Addressed to: Bureau of Human Resource Management

Management Response

Accepted

HRM is ready to resume and launch the MMP. Further consideration is necessary in order to determine the optimal cycle, whether annual or biannual, taking into consideration the effect this will have on budget, availability of posts, and numbers of staff reaching their standard duration of assignment. In terms of planning, HRM suggests that for this next cycle, posts be advertised in the fourth quarter of 2020, with selection notices to go out at the end of the first quarter of 2021. "Appropriate incentives" can only be identified (and budgeted) at a later stage.

Accepted

Managed Mobility is an integral part of the Strategic Transformation process, with one of its ultimate goals to support the development of an agile and multi-faceted workforce in the context of the 2030 Agenda. HRM will continue to build on the comprehensive communication strategy emphasizing the strategic linkages to mobility, using a variety of mediums. Information sessions will continue to be made available to all concerned staff, considering time zones and regions, in order to not only inform the mobility process but also increase understanding of the strategic goal. In addition, mobility will also align with UNESCO's future presence in the field when this is approved and implemented.

Recommendations

Recommendation 3: Review posts not subject to mobility

Although the review of the list of posts not subject to mobility is due until next year, consider reviewing it before the next cycle, looking closely, among other aspects, at the posts that could not be filled in the first round on account of an absence of equivalency in another duty station.

Addressed to: Bureau of Human Resource Management

Recommendation 4: Review the deferment process

Personal/medical deferments are needed, however sufficient time needs to be accorded to a process that relies heavily on one individual (CMO and Staff Counsellor). The reasons for granting each operational deferment need to be openly and transparently communicated to all staff. HRM should monitor the numbers of personal and operational deferments in successive iterations with the goal of reducing them from the levels of 2019.

Addressed to: Bureau of Human Resource Management

Recommendation 5: Broaden involvement in review/matching

Reconsider the composition of the Mobility Review Panel (MRP) and the Senior Mobility Review Panel (SMRP) aiming for more involvement of sectors and institutes who can provide insight and knowledge on the technical exigencies of posts. As part of workforce planning, map out the expertise in UNESCO identifying the skills or technical competencies required for certain posts or in specific regions/countries. Involve receiving managers by sending beforehand the list of candidates and profiles who have expressed an interest in posts under their supervision.

Addressed to: Bureau of Human Resource Management

Management response

Accepted

The latest list of posts not subject to mobility was announced in February 2019 along the lines of the criteria stated in the mobility policy. While the list is approved and published every two years (HR Manual, 5.10 Mobility, para 16), it will be exceptionally reviewed in 2020, in light of the evaluation and its findings, before the next cycle of geographical mobility. The review will be conducted in consultation with Sectors, Bureaux, Field Offices, and Institutes as was done previously.

Accepted

To accommodate staff members' personal and family circumstances, deferment processes will be conducted with due consideration for the need for sufficient time to be allocated additional timeframe, and closely monitored. HRM will allocate additional time to facilitate distinct personal and medical deferment, and operational deferment. Deferments should take place as quickly as possible once mobility is re-launched, in order to identify a final pool of posts to be opened to the MMP. Medical deferment requests can only be evaluated initially by the Chief Medical Officer and personal deferment requests initially by the Staff Counsellor, and HRM takes note of IOS concerns of ensuring enough time is given to provide due consideration to each request. HRM will closely monitor the number of requests and approvals with the aim of producing a well-balanced result, and provide as many options as possible to the concerned staff.

Accepted

The compositions of the Mobility Review Panel (MRP) and the Senior Mobility Review Panel (SMRP) were established to ensure cross-organizational discussion to the extent possible and to avoid potential conflict of interest. Further to the recommendation, the composition will be reconsidered to include additional members from Sectors and Institutes for their technical insights and considerations. In the inaugural geographical mobility exercise, all Assistant Directors-General were present at a review meeting prior to submission of the final proposals to the respective MRPs, to establish a cross-organizational approach.

Additionally, in order to strengthen the review and matching processes, the receiving managers will be able to express their views on the expressions of interest they have received upon closing of advertisements. The inputs of the receiving managers will be taken into account at the Sector/Bureau/Field Office/Institute-level review sessions as well as at the MRP-level review sessions.

Recommendations

Recommendation 6: Adjust timing on decision and notification

Establish a geographical managed mobility timeline that provides at least five to six months from the time staff receive notification to the moment they are expected to join their new assignment. Notification period should take into account school calendars and ideally avoid moves in the middle of the school year for families with children.

Addressed to: Bureau of Human Resource Management

Recommendation 7: Facilitate relocation

Prepare relocation packages for each UNESCO duty station. Develop checklists for staff members moving so that they know what steps are their responsibility and what processes will be assumed by HRM. Clarify in the policy, in a more concrete manner, how UNESCO can support spouse employment and have the staff resources and inter-agency agreements to back claims of support made in the policy.

Addressed to: Bureau of Human Resource Management

Recommendation 8: Ensure quality handover

Establish a mandatory handover process that includes ideally a face-to-face period or a virtual gathering with a discussion of a handover note. Consider producing a template handover note in the context of managed mobility. When face-to-face handovers are not possible, consider familiarization visits taking this into account when estimating the average cost of each move.

Addressed to: Bureau of Human Resource Management

Management response

Accepted

We note that this recommendation is within the context of allowing sufficient time for staff members to make arrangements at the new duty station, notably for those with school-age children. The timeline will be adjusted with this in mind, especially taking into account of the school calendar. It should be noted, however, that currently there is already a delay in the timeline of the 2020 exercise, which has yet to be discussed by Member States. Should the geographical mobility exercise be resumed and launched in 2020, notifications of movement will go to staff members at the end of the first quarter of 2021. Future exercises will be adjusted to allow notifications to go out earlier in the calendar year, to facilitate school enrolment. As was the case of the latest exercise, staggered departures will continue to be considered.

Accepted

HRM will coordinate with Field Offices to ensure that adequate information, in particular on housing, schools, etc. is provided to staff on reassignment. At the same time HRM will build on UN information packages already available, to the extent possible. As far as spouse employment is concerned, provision of information on host country agreements for work visas could be part of the information package mentioned. Information and search for actual employment opportunities remain the staff member's responsibility.

Accepted

A standardized handover process, including handover templates, will be designed for and be made available to the concerned managers and staff members to refer to and use. While guidance and recommendations of the handover process will be provided, managers and staff members will continue to be responsible in ensuring proper and quality handovers and HRM will monitor the overall completion of handovers. The process will recommend face-to-face or virtual meetings, and if the financial resources allow, familiarization visits should also be used as an occasion to facilitate the handover process.

Recommendations**Recommendation 9:
Build in Career incentives**

Staff members should be allowed to express interest for at least one higher-level post. This will require an open conversation and discussion process with Member States with a view to reconsidering the General Conference decision, which requires all promotions to be subject to internal and external competition.

Alternatively, HRM should review other career incentives for mobility such as in-step promotions and temporary assignment taking this into account when estimating the average cost of each move.

Addressed to: Bureau of Human Resource Management

Management response**Accepted**

Concerning the recommendation to allow expressions of interest for posts at a higher level, Staff Regulation 4.4 calls for appointments to be made on a competitive basis following formal advertisement – internal and external inclusive. As the evaluation notes, it will thus require consultations with and decision by the Member States to allow appointments to higher-level posts in the context of geographical mobility, considering the benchmarking noted in the evaluation report. Thus the implementation of this recommendation would require approval of the General Conference and as such HRM will not be able to implement it before the 2022 mobility exercise.

The measure on additional in-step increments had been removed from UNESCO's previous rotation policy, at the request of the Executive Board (181 EX/Decision 6), to align with the UN common practices. The compensation and benefits package designed by the ICSC takes mobility, hardship and related arrangements into account that are intended to encourage geographic mobility and to compensate for hardship incurred in difficult duty stations. They include one or more of allowances such as mobility incentive, hardship allowance, non-family service allowance, accelerated home leave etc.

Introduction

A. Background to the Evaluation

1. The Executive Board at its 208th session invited the Director-General (DG) to request the Internal Oversight Service (IOS) Evaluation Office to undertake an independent evaluation of the first managed geographical mobility exercise, its processes and outcomes and its effects on the availability of high-level expertise and career development prospects. The Executive Board further requested the Director-General to temporarily pause the managed mobility programme and present the results of the independent evaluation at the 209th session with a view to fine-tune the mobility and resume its full implementation.
2. The objective of the evaluation is to provide an independent assessment, based on available evidence, of the main results of the first managed geographical mobility exercise with an emphasis on providing lessons learned and recommendations on the best way forward.
3. The evaluation focuses on:
 - **The implementation process.** Led by the Bureau of Human Resources Management (HRM), this involved distinct phases leading from the development and announcement of the mobility policy in late 2018, to the relocation and onboarding of the staff members who were part of the geographical mobility.
 - **The outcomes.** This section reviews staff perspectives and perceptions on the potential effects of managed geographical mobility on career prospects, available expertise and capacity to deliver workplans.
4. IOS carried out the evaluation from late November 2019 to February 2020. An evaluation Reference Group reviewed and provided comments to the Terms of Reference and the draft evaluation report.¹ The scope of the evaluation excludes other human resources issues such as reclassification, recruitment, and staff performance management. The first managed mobility exercise was still ongoing

¹ The Reference Group is composed of: the Director of HRM, the Head of the Mobility Team, representatives of the two staff unions, one staff member from a Field Office and the Director of a Category 1 Institute.

(not all staff members had assumed their new posts) at the time of the evaluation, consequently it is premature to determine the full impact of mobility on expertise, career progression or delivery. The discussion in the evaluation report on the outcomes of the managed mobility exercise on these human resources aspects is mostly based on the perspectives and perceptions of staff members and managers.

5. The data collection methods of the evaluation were interviews, review of documents and analysis of survey results. Whenever possible, IOS triangulated with multiple data sources. In addition, the evaluation benefitted from an internal IOS brainstorming session.

Table 1. Overview of interviews conducted for the evaluation

› **Fifty-eight interviews**, conducted in person or by telephone.²

Assistant Director Generals (ADGs)	8
Directors and other staff with relevant involvement with the mobility exercise, HQ	11
Directors of Category 1 Institutes	3
Directors Field Offices	12
Staff (part of the mobility)	16
Staff from HRM and mobility team*	6
Staff Unions*	2
Total	58

*Mobility Team and staff union interviews are counted as one although the interview included more than one individual

² To arrive at a feasible number of interviewees IOS conducted random samples of Directors of Category 1 Institutes, Directors or Heads of Field Offices and staff involved in the mobility.

- Desk review of documents.** IOS reviewed policy documents, circulars, memos, email communications, letters and lessons learned documents.³ Further, the analysis included mobility policies from other UN agencies and the recent evaluation/ review of the mobility exercise in the World Health Organization (WHO) and in the United Nations Secretariat.
- Surveys.** IOS decided against an additional survey and analyzed the survey results deployed by a staff union (STU) and the survey organized by HRM.
- 6. Limitations.** The mandate for this evaluation came at the 208th session of the Board in late October 2019 and without the provision of extra resources. This left less than three months for the evaluation exercise leading to a condensed process. IOS commenced the evaluation while some staff were still in the process of being placed whereas others had been in their post for less than a few months. Therefore, it is too early to assess longer-term impacts of the Managed Mobility Programme (MMP) on career prospects, availability of expertise or delivery of results. The evaluation team decided not to conduct a new survey since two had already been undertaken. IOS used selected results from the HRM survey as well as the open-ended comments from the STU survey.

B. Background to Mobility in UNESCO

- 7.** According to the Human Resource Management Strategy 2017-2022, mobility enables staff to broaden their experience, skills and knowledge, supporting their career development and thereby allowing the Organization to have a more agile, versatile, motivated workforce. For the most part, UNESCO staff and senior management have been supporting this vision and rationale for mobility. A recent IOS evaluation found: “most stakeholders see staff mobility as key to helping the Education Sector function as one, and for staff within the Organization to develop a greater understanding and appreciation for how different parts fit together.”⁴ In 2018, Member States reiterated the importance of the implementation of a robust mobility strategy in UNESCO⁵ and that same year, the UNESCO Staff Survey documented strong support for mobility.⁶ Staff unions for their part have expressed

³ HRM conducted a lessons learned exercise. The evaluation integrated the document to its desk review.

⁴ Evaluation: “The Future of UNESCO’s Education Sector: the normative vs operational role in the context of Agenda 2030.”

⁵ At the 205th session of the Executive Board, 205 EX/SR.6.

⁶ As an overarching concept, 84% of those who responded to the survey agreed that mobility is of great importance for the effective functioning of an international organization like UNESCO, 76% believed that a mobility program is beneficial for career development and 69% said they would be willing to move to a different duty station in UNESCO in the next five years.

their support for mobility characterizing it as an opportunity to provide UNESCO staff with new professional experiences, while responding to the Organization’s operational needs.⁷

- 8.** Before 2019, UNESCO had tried unsuccessfully to implement managed mobility. In 2009, the Executive Board “strongly supported the introduction by the Director-General of the policy of mandatory rotation for all international staff” and HRM produced a strategy for the implementation of geographical mobility. In 2015, UNESCO developed a new geographical mobility policy (revised in July 2016). Mainly due to budgetary considerations, UNESCO did not implement either policy.
- 9.** UNESCO adopted a new mobility policy in December 2018.⁸ The mobility policy explicitly establishes a link between mobility and the demands of the 2030 Agenda for Sustainable Development.⁹ HRM introduced the MMP as an integral part of the Strategic Transformation process¹⁰ with both geographical mobility, for international professional staff (P and above level), as well as functional mobility for both international, national and general service staff. A solid MMP is part of UNESCO’s full-fledged involvement in the new UN Country teams and UN Sustainable Development Cooperation Framework, which require all UN agencies to improve their coordination at the country level. For Strategic Transformation a goal of making the Organization more efficient and more focused at the country level involves having more people moving within the Organization and having a strong country presence.

Main Features of UNESCO’s Workforce

- 10.** UNESCO has a workforce of over 2,000 staff, of which around 740 are international posts. Just over half of these international posts (60%) are located in Headquarters. Before the implementation of the MMP the rate of geographical mobility was in the range of 10%-12% per biennium (around 40 staff moving annually).

Main Features of the UNESCO Mobility Policy

- 11.** HRM led the process of developing the new mobility policy by reviewing past UNESCO policies existing on paper, integrating good practices from other

⁷ STU Flash, 1st March 2019.

⁸ The policy responds to a commitment in the UNESCO Human Resource Strategy, approved by the General Conference in 2017. The Strategy contains 12 human resources priority initiatives over a six-year period. One of these priority initiatives is mobility.

⁹ Administrative Circular AC/HR/65 introduced in December 2018 features UNESCO’s Managed Mobility Programme (Mobility Policy).

¹⁰ Strategic Transformation Newsletter, Special Edition on Mobility, July 2019.

mobility experiences and harmonizing elements, such as the Standard Duration of Assignment (SDA), with other UN agencies.¹¹ In interviews, many senior managers acknowledged the consultative nature of the policy development process highlighting the role of the intersectoral working group.¹² It should be noted, however, that one of the staff unions (STU) indicated they were not consulted on the draft policy. Similarly, the Gender Division affirmed they were not consulted on the draft policy nor did they participate in the intersectoral working group.

12. The key features of the Mobility Policy are the following:¹³
 - The reassignment is at equal grade.
 - Applicable to all internationally recruited staff on fixed term appointments.
 - Eligible staff members who have reached or exceeded their Standard Duration of Assignment (SDA) are considered for reassignment.
 - Eligible staff members may voluntarily opt into the geographical mobility exercise.
 - Certain posts designated as not subject to geographical mobility by the Director-General.
 - Staff members occupying posts not subject to geographical mobility may voluntarily participate in the mobility exercise.
 - The exercise is annual.
13. A goal of the MMP was to encourage mobility not only geographically but also between sectors and between sectors and central services. As stated by ADG/ADM: "The more that people can cross from one "silo" to another, the more we will be in a position to foster UNESCO's identity as one united organization, with common, shared goals. The Mobility Programme can help to support other parts of the Strategic Transformation, as we are looking to make the Organization more efficient, more focused at the country and more results-focused. Therefore, having more people moving within the Organization and seeing things through a different lens will support all aspects of the transformation."¹⁴ The first MMP had 2 "cross-sectoral" moves.¹⁵

¹¹ In addition, HRM consulted the Advisory Council on Personnel Policies (ACPP).

¹² The intersectoral working group was composed of 19 participants from all 5 Sectors as well as IOC, PAX, BFM, BSP, HRM and Field Offices.

¹³ HR Manual Item 5.10 – Mobility.

¹⁴ Mobile & Agile UNESCO: breaking down 'silos', Strategic Transformation Newsletter, Special Edition on Mobility July 2019.

¹⁵ From one Programme Sector to another Programme Sector, excludes moves from a Programme Sector to Central Service or between Central Services.

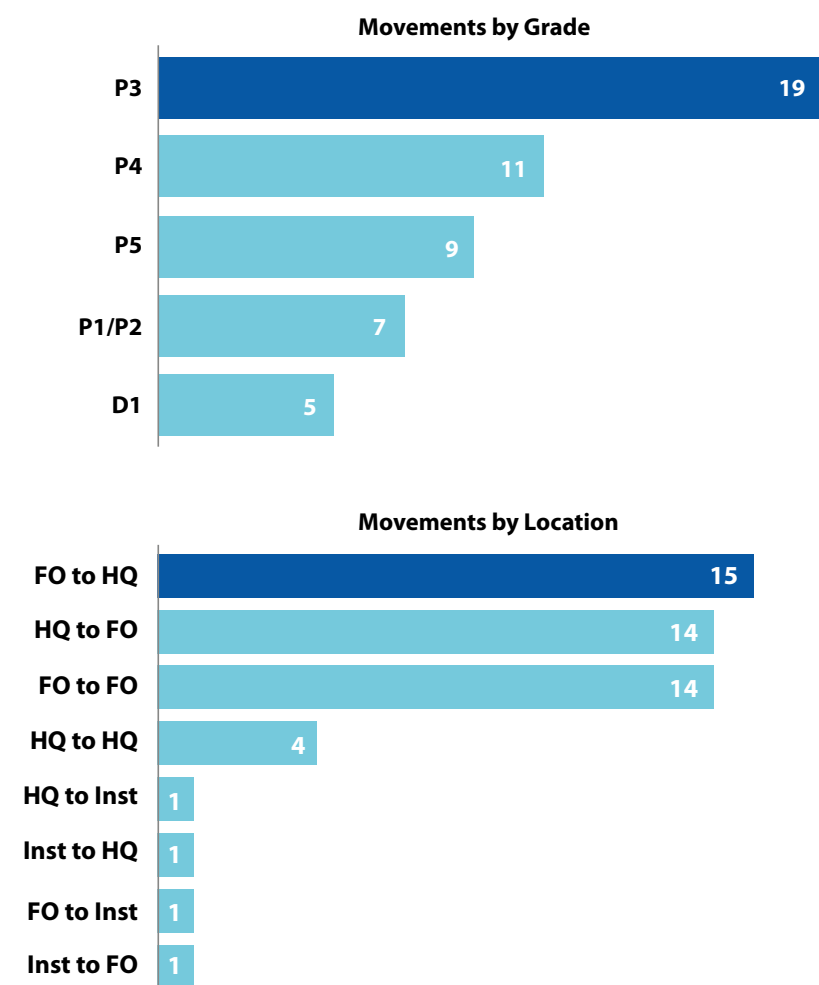
Numerical Results of the First Managed Mobility Exercise

14. From late 2018 and into 2020, HRM implemented the first geographical managed mobility exercise and moved a cohort of 51 staff members. As illustrated in Annex 1, HRM identified 356 staff members having reached their SDA in Headquarters, Institutes and Field Offices. Of these, 185 individuals had not moved functionally or geographically and therefore were subject to participate in the managed mobility. Ninety-five staff members requested a medical or personal deferment and in the case of 70¹⁶ staff members, their Sector/Bureau/Institute requested an operational deferment. A first pool of eligible candidates for mobility was composed of 107 staff members: 55 who did not request deferment and were eligible, 24¹⁷ who were not granted deferment either personal or operational, and 28 who opted on a voluntary basis. The final pool of eligible candidates for mobility was 100 (7 staff members left the exercise for various reasons).¹⁸ The final number of staff members reassigned as part of managed mobility was 51 (14 voluntary). As can be seen in Figure 1 below, of the final group of 51, the largest proportion, were at the P3 level and in terms of type, moves from Field Offices to Headquarters, Headquarters to Field Offices and Field Offices to Field Offices were practically the same (14-15). In terms of gender distribution, 51% of reassignments were male and 49% female.

¹⁶ In some cases, among the 70 staff members that had a request for operational deferment some also submitted a personal/medical deferment request.

¹⁷ Two staff members withdrew their request for deferment after it was granted.

¹⁸ 3 had agreed separations, 2 had appointments through recruitment, 1 retired, and 1 requested special leave without pay (SWLOP). All 7 were part of the group that had not requested deferments.

Figure 1. Movements by grade and location

*Figures provided by HRM

15. Before the geographical managed mobility exercise, an average number of 40 staff moved positions or locations every year at UNESCO. These were typically ad-hoc lateral moves or part of a competitive recruitment process. The exception was the managed movement of Administrative Officers (AOs) organized by the Bureau of Financial Management (BFM).¹⁹ Comparing to previous years, therefore, the total number of moves in 2018-2019 increased. Without managed mobility the number of moves for 2018-2019 would have been around 76, which is similar to the figure from 2016-2017.

Table 2. Trends in the number of geographical moves of P/D staff 2012-2019

2012-2013	2014-2015	2016-2017	2018-2019
86	100	79	123 (47* as part of managed mobility)

*Figures provided by HRM. Excludes 4 HQ to HQ moves.

16. The average cost for a geographic move was estimated at \$38,000 per move.²⁰ Up to February 2020 the costs incurred for 43 staff members was of around \$1,650,000 in total.²¹

C. Findings

Implementation-Overall

Key finding: While the implementation phase suffered from a number of problems and weaknesses and a majority of staff members interviewed had mixed views overall on the implementation process, most staff and managers believe mobility should be resumed, provided necessary adjustments are incorporated.

¹⁹ The process that had been applied by BFM is similar in many respects to the managed mobility introduced by HRM but includes at least three aspects not specified in the Administrative Circular AC/HR/65 (Mobility Policy) and therefore not applied during the 2019 Mobility Exercise: an informal interview, the express requirement of delivering a handover note and training needs.

²⁰ The estimated budget of \$38,000 comes from the standard staff costs attached to each position.

²¹ There are variances depending on the type of move. Some examples: from HQ to Kabul \$29,200; from Beirut to Santiago (P5) \$39,500, from Rabat to HQ; \$48,100; from Kathmandu to Juba \$21,800. Type of costs included: air tickets, DSA, assignment grant, removal, medical check.

17. The process of the MMP had a number of phases. The phases reviewed in the evaluation are: planning, deferment, advertisement, review/matching, decision/notification and transfer/relocation.²²
18. As can be seen below in table 3, most staff members interviewed (53%) had mixed views overall on the implementation process of the MMP pointing to stronger and weaker elements. More than one quarter of interview respondents criticized the entire process. Interview respondents noted the enthusiasm and good will of the Mobility Team leading the implementation and commended HRM for finally moving forward such a complex organizational priority. Furthermore, some staff, particularly those with experience in other UN agencies, pointed out that geographical mobility is difficult to implement in any agency and that a cultural corporate change requires time. Almost three-quarters of respondents of the closed-ended question indicated that the MMP should be resumed.

Table 3. IOS key informant interviews - responses to close-ended question

Overall do you think managed mobility was well implemented?*		Do you think managed mobility should be resumed**	
Yes	20%	Yes	74%
No	27%	No	10%
Mixed	53%	Not sure	16%

*Closed ended question as part of interviews, out of 30 interviewees who answered the question

**Out of 31 interviewees who answered the question

19. Some interviewees mentioned that the implementation of the MMP suffered weaknesses but countered that these are normal considering this was the first managed mobility implemented by UNESCO. In addition, staff, particularly in the field, highlighted that the MMP introduced a level of formality and predictability to a process that hitherto hinged on personal connections, providing more equal opportunities for people to move regardless if they are in the Field or in Headquarters.
20. Viewing the implementation of mobility as a whole, a large majority of interviewees and survey respondents alluded to an extremely compressed execution timetable. Implementing managed mobility in the timeframe established for the first exercise did not allow sufficient time to provide adequate support. Some noted that the imperative to deliver mobility, in a very short time frame, generated unrealistic deadlines and a feeling of rush detrimental to the well-being of staff members.

It also contributed to a perception that was voiced by a good number of respondents interviewed by IOS, that this first managed mobility exercise's utmost goal was "movement for its own sake".

Planning Phase

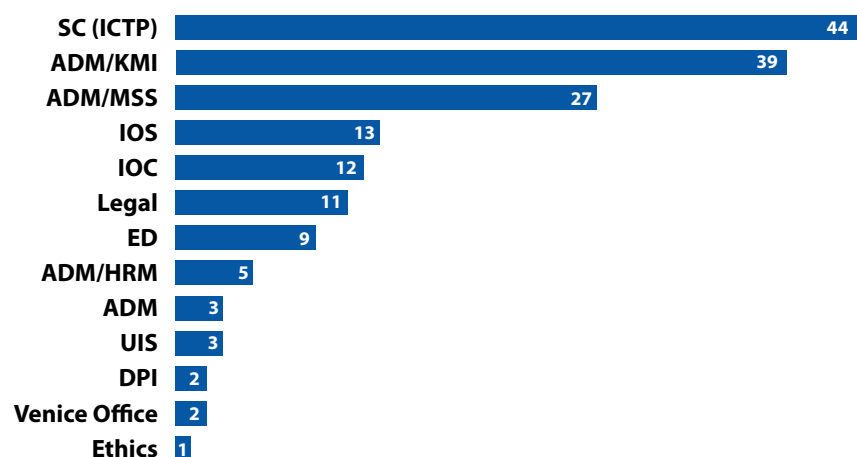
EQ: How well was the planning phase carried out? What communication was provided to staff? How was the list of posts not subject to geographical mobility compiled?

Key finding: *The list of posts not subject to geographical mobility is missing posts that do not have an equivalent outside of one duty station and the criteria for making posts not mobile on account of a "special competency or skill" was not consistently applied. The communication strategy included numerous products with different approaches depending on the target groups.*

21. The planning phase spanned three months, from December 2018 to February 2019. It involved two main elements: (i) the process of identifying the posts that would (and would not) be included in mobility and (ii) launching the process of communicating to UNESCO staff the rationale for mobility and the upcoming phases.
22. An Information Circular from February 2019 established 171 posts as not subject to geographical mobility.²³ Two criteria defined these posts: (i) special competencies and/or expertise and (ii) if the location of all comparable posts was in the same duty station. The policy establishes a review of the list every two years. The largest number of posts not subject to mobility (44) are in the International Centre for Theoretical Physics (ICTP) in Trieste followed by the Division of Knowledge Management and Information Services (KMI) and the Bureau for Management and Support Services (MSS), which includes almost all translators. The nine posts from the Education Sector are the Directors of the Education Category I Institutes. All of the Programme Sector posts were included in mobility.

²² The phases reviewed in the evaluation are adjusted from: <https://en.unesco.org/unescocommunity/themes/unescocommunity/process-and-timeline>.

²³ List as approved by the DG, IC/HR/156.

Figure 2. Lists of posts not subject to geographical mobility by Sector/Service

*Produced by IOS based on Information Circular IC/HR/156

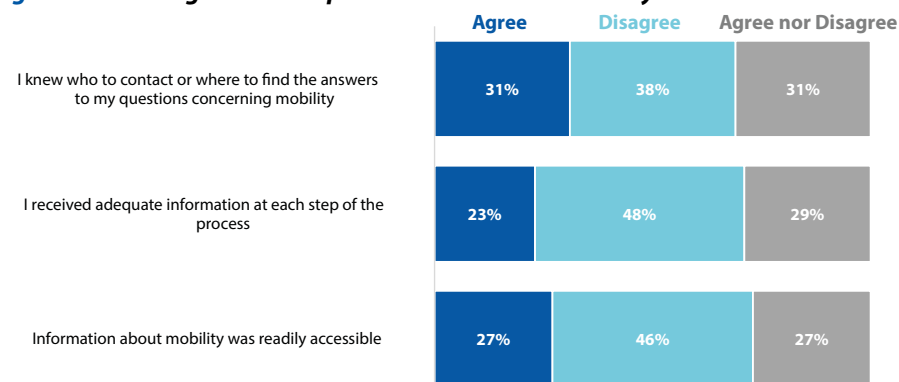
23. Interview respondents from all levels harbored confusion on how the list of posts not subject to mobility was defined. Many provided specific examples of posts that, to their understanding, do not have an equivalent outside of one duty station but which had nonetheless been included as part of mobility. An even more complicated and potentially subjective criterion was to exclude posts from mobility when they involved a “special competency or skill.” A number of interviewees pointed to positions that, in their view, required a special competency or skill but that nonetheless were not incorporated into the list. In a similar vein, some Directors, including from Institutes, were not consulted during the development of the list although there are posts under their purview, which, in their perspective, clearly require a specialized competency.²⁴
24. HRM launched the mobility exercise with a communication plan that included diverse types of efforts targeted to different audiences. This included 10 information sessions at Headquarters organized for each Sector and Bureau (also available via webcast for Field Offices); 10 information sessions for all Field Offices, covering different regions and time zones; 1 separate information session for ICTP/TWAS;²⁵ 1 information session for UIS; 1 information sessions for EOs and 3 town hall meetings after the launch of notifications. In total, more than 600 (including 149 staff from the field) participated in some manner in the information sessions. Some other communication

²⁴ Sectors were responsible for consultation with Institutes.

²⁵ The World Academy of Sciences for the advancement of science in developing countries (TWAS).

activities were newsletters, videos, visual images and a dedicated webpage, which was launched on 13 December 2018 and aimed to provide an overview on the MMP and explain the process step-by-step. It featured nine “Mobility Ambassadors” and two video messages from ADGs supporting mobility. There were three MobilityTalks sessions inviting colleagues from the Field Offices or with field experience to share their experiences. HRM also introduced the Mobility HelpDesk, a dedicated mailbox, responding to any questions coming from staff members.

25. While some staff interviewed found the communication informative and useful, others found it to be unclear, confusing and impersonal. A number of interviewees indicated that townhall meetings should have been replaced by personal discussions, right at the launch of the process with those potentially involved in order to explore real options and provide clear guidance about what to expect. Although, personal communication is ideal, dedicated one-on-one conversations with all staff members involved might be unrealistic in a context of dozens of moves. Staff in the field offices were offered to join information sessions and town-hall meetings by videoconference but some indicated few possibilities to address their questions and a sense the effort overly focused on colleagues in Headquarters.
26. In the survey conducted by HRM (see Figure 3 below), a larger proportion of respondents did not think access to information was readily available or adequate or that they knew whom to contact. Close to one-third of respondents reported they knew whom to contact with questions but a slightly higher proportion reported not to know. Forty-six per cent of respondents disagreed that information was readily accessible.

Figure 3. Planning Phase - responses from the HRM Survey

*HRM Survey. Population size N = 213; respondents = 113 (53 per cent response rate).

Key lesson learned: Despite enormous efforts to reach out and communicate about mobility through different modalities; staff still felt information was not adequate or accessible.

Deferment Phase

EQ: How well was deferment implemented including timing and criteria for deferment? Were the criteria for deferment clear?

Key finding: The number of deferments granted was high; some viewed the process as straightforward, however many others underlined a lack of clarity and inconsistency, particularly for operational deferments.

27. The mobility policy established deferments as a provision for postponing the geographical move of a staff member on personal/medical grounds or operational considerations. There were four criteria for personal and medical deferments.²⁶ Managers submitted operational deferments due to organizational exigencies and the need for adequate staffing capacity to implement activities and projects.²⁷
28. A majority of staff eligible for mobility availed themselves of the option for personal/medical deferment. Of 185 staff members eligible for mobility, 95 or more than half (51%) sought a personal or medical deferment (3 requests overlapping, total number of request: 98) and for 70 staff members, their Sector/Bureau/Institutes requested an operational deferment (including 38 overlapping with personal and medical). Of the personal/medical deferment requests, 67% were granted. In the case of operational deferments, 60% were granted.
29. Of the total number of personal and medical deferments granted, 70% were for staff members based in HQ and 19% for staff members based in four Institutes. The remaining 11% were for staff members in Field Offices. In terms of gender, 40 (62%) of personal/medical deferments were granted to female staff members.²⁸

²⁶ A medical condition, disability, a child within 2 years of graduating from high school in the current duty station and "other" compelling family/personal circumstances.

²⁷ Final decision on operational deferments rested with the Director of HRM and ADG/ADM and could not exceed a non-renewable period of two years.

²⁸ Data collected by WHO in 2016 through an online survey indicates that women are in general less inclined to seek geographical mobility (frequently for family reasons). In Summative evaluation of the implementation of the WHO Geographical Mobility Policy during its voluntary phase Volume 1: Report, January 2019.

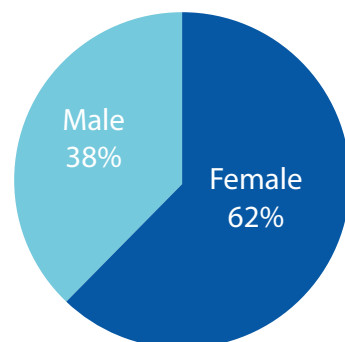
Table 4. Mobility statistics - breakdown by location, gender and grade

	By location		By gender		By grade					Total
	HQ	FO and Inst	Female	Male	P-2	P-3	P-4	P-5	D-1	
Staff notified	109	76	106	79	37	66	46	27	9	185
Operational deferment	47	23	36	34	17	24	16	13	-	70
Medical/ personal deferment	66	29	55	40	20	32	28	11	4	95
Staff included in the mobility pool after deferment	32	40	38	34	9	24	21	11	7	72
Volunteers	10	18	13	15	2	7	8	7	4	28

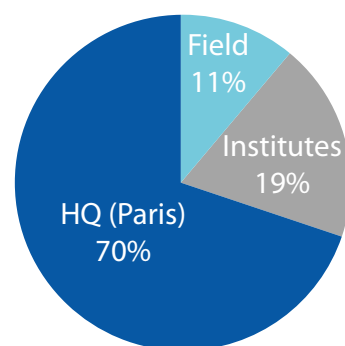
*Figures provided by HRM

Figure 4. Personal/medical deferments granted by gender and location

Personal/medical deferments granted by gender

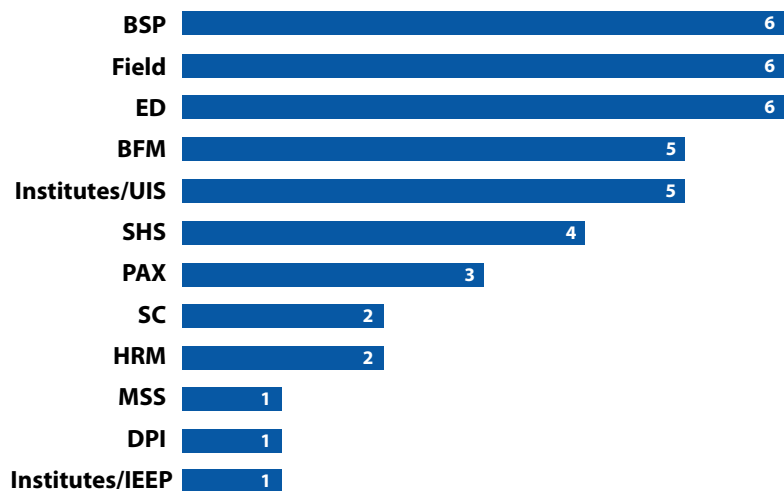


Personal/medical deferments granted by location



30. The staff counsellor had the responsibility for reviewing all personal deferment requests. The Chief Medical Officer (CMO) reviewed all medical deferment requests with a final decision by the Director of HRM and the ADG/ADM. This was problematic as it placed undue responsibility for sensitive decisions on one individual and it naturally slowed down the process as the numbers of requests for deferments was high.
31. Some interviewees viewed the large number of deferments as negative for the good functioning of mobility. With so many posts withdrawn, the pool of availability for those that remained was limited. In their view, the option for deferments should be maintained, but used sparingly and only for exceptional circumstances. Others spoke of frustration to what they perceived as manipulation of the deferment system by both individual staff and Sectors/Bureaux.
32. Of the 19 staff members directly concerned with the deferment process and interviewed as part of the evaluation, six reported overall satisfaction and considered the procedure straightforward. In contrast, six other interviewees deemed this phase as biased and non-transparent. In the case of operational deferments, staff maintained that the criteria used by managers to request operational deferments for their staff was not clear to them.²⁹ While some managers requested almost blanket deferments for most of their staff, others did not request any operational deferments. A number of respondents argued that the conditions and rules for requesting operational deferments were not sufficiently defined in advance opening the door for inconsistency from one Office, Sector or Service to another.
33. In interviews, some managers argued strongly that the option of having operational deferments was essential particularly if their Office was undergoing a restructuring. Others pointed out that the timing of the mobility might have also influenced the number of operational deferments with exigencies to deliver before the end of the biennium.

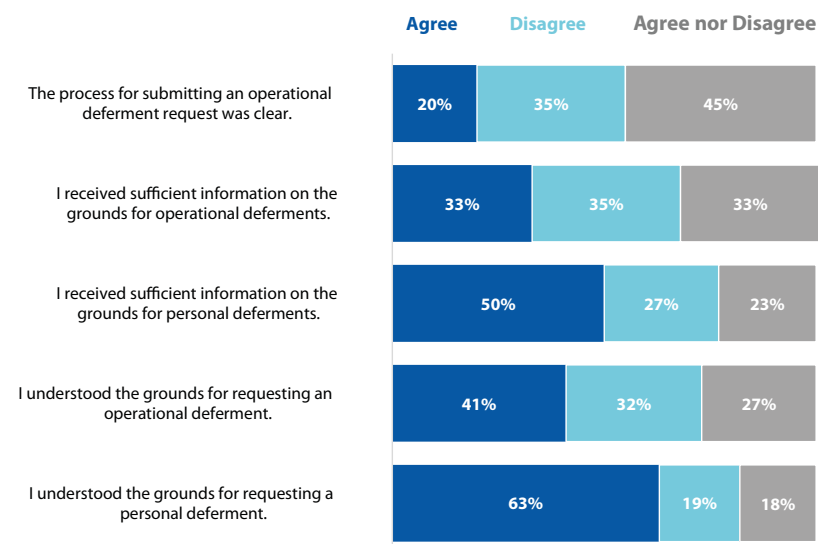
²⁹ The criteria for operational deferments is included in the HR Manual Item 5.10. The Sector ADGs/Directors of Bureaux may request an operational deferment in the case where the reassignment of a staff member in the upcoming mobility exercise would be detrimental for Programme delivery or where the simultaneous departures of staff from the same Sector/Bureaux/Field Office/Institute would negatively impact operations.

Figure 5.** Number of operational deferments by Sector, Service or Office

Figures provided by HRM

**Sectors that did not have any operational deferments do not appear in the Figure.

34. In terms of the process for obtaining deferment, in general staff members were more certain of the parameters for obtaining a personal/medical than for an operational deferment. Results from the HRM survey (See Figure 6) indicated that only 20% agreed that the process for submitting an operational deferment was clear. Whereas 63% of respondents understood the grounds for requesting a personal deferment only 41% did for an operational deferment.
35. The implementation of deferment (and the later pause to the mobility exercise) brought to the surface sentiments of unequal treatment of staff in Headquarters and in the Field. In some interviews as well as in a letter penned in one Field Office, the introduction of personal deferment (as well as the pause of the MMP) was perceived as a maneuver by Headquarters staff to preserve their privileged situation.

Figure 6. Deferment Phase - responses from the HRM Survey

Key lesson learned: Criteria for operational deferments have to be better communicated to avoid perceptions of unfairness and opacity in the process.

Advertisement of Opportunities Phase

EQ: How well was the advertisement phase carried out?

Key finding: The options available in the mobility compendium were limited.

36. From April to May 2019, HRM advertised the compendium of available posts. The posts were advertised internally through Taleo (IT Tool) for a period of 30 days, on the dedicated Careers page for the Mobility. Each vacancy notice included an overview of the functions of the post; the required qualifications in terms of work experience, technical knowledge, functional/job-related competencies/skills and languages. Staff were required to express an interest in a maximum of three posts at equal grade, indicate their order of preference, and answer a questionnaire on relevant skills, professional achievements and any special circumstances to be considered.

37. The mobility compendium involved 113 posts, including 46 in Headquarters, 62 in the Field Offices and 5 in the Institutes. It combined both occupied (72) and vacant (41) posts but did not include posts of staff who had voluntarily opted-in to the mobility exercise. A total of 100 staff members vied for the 113 posts in the compendium.

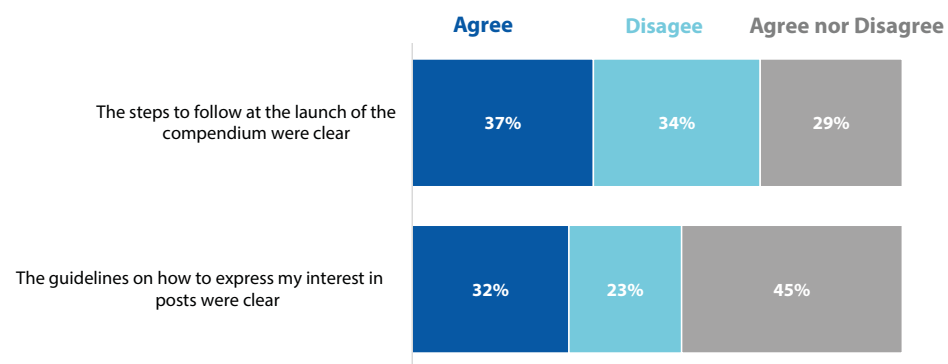
Table 5. Mobility compendium - breakdown by duty station

Breakdown by Duty Station of the mobility compendium					
Duty Station	Number of Posts	Vacant	Occupied		
HQ	46	13	33		
Field	62	26	36		
Institutes	5	2	3		
Total	113	41	72		
Breakdown by Grade and Sector of the mobility compendium					
	D1	P5	P4	P3	P2/P1
CI		2	1	2	2
CLT		2	6	7	2
ED	1	6	10	8	1
SC		3	4	5	1
SHS		1	5	2	
ED/INST		1		3	
GEN		1			
MSS		1		2	
PAX/FSC	5	1			1
ADM			1		
BFM			2	3	9
BSP			1		
DPI				3	
HRM				1	
IOS				1	
Total	6	24	30	37	16

*Data provided by HRM

38. The large majority of interview respondents claimed that the mobility compendium was very limited. They described a situation in which they had little choice or did not find any suitable posts matching their grade and background. As seen above, there were cases at all levels where there was only one available post in a given Sector/Service and grade level. Many interviewees said they were compelled to express an interest for posts for which they considered themselves unqualified to perform. Staff from HRM pointed out that in this cycle the posts of volunteers was not included which could have increased the available posts in the compendium pool.
39. HRM prepared a thorough user guide to help staff navigate through the mobility compendium online portal and the steps required to submit expressions of interest. From the HRM Survey, a slightly larger proportion of 37% thought the steps were clear whereas 34% indicated they were not clear. In interviews, some staff claimed they were not offered sufficient guidance or assistance in the application process or that the application process cumbersome and confusing. Elements of the process were unspecified for example what to do if there were less than three pertinent posts.

Figure 7. Advertisement of Opportunities Phase - responses from the HRM Survey



40. Interviewees raised concerns regarding the vacancy notices³⁰ and job descriptions. The advertised vacancy notices were found to be inconsistent in terms of job specifications and relevant information concerning the post. In the open-ended portion of the HRM Survey some respondents considered their job descriptions³¹ as incorrect or incomplete and some claimed the vacancy notices included outdated job descriptions.

Key lesson learned: UNESCO has a relatively small workforce with highly differentiated areas of expertise which results in very limited number of positions in the same grade and area of expertise contributing to frustration with available options for moves.

Review/Matching Phase

EQ: How well was the review and matching carried out? Were decisions on matching carried out on the basis of a predefined, transparent set of criteria?

Key finding: Some sectors expressed that their matching recommendations were not sufficiently taken into account resulting in decisions that did not consistently take into account the background and competencies of staff in order to achieve a best fit for the individual and the organization.

41. HRM provided Sectors with a list of staff subject to mobility and relevant posts in the mobility compendium. It also provided updated CVs/profiles and performance reports covering the last two years. Review sessions took place within each Sector/Bureau/Institute, chaired by the respective ADG/Director and the Chief of the Executive Office (or other designated senior staff at the P-5 level and above), and an HRM representative. Staff members' profiles were matched to positions in accordance with the established criteria (i.e. job-related skills/competencies, language skills, length of service, mobility history). Sectors were then tasked with reviewing and preparing matching proposals for reassignment and continuation in post to be taken into account by the review panels.

³⁰ Vacancy notices were provided by each Sector/Bureau.

³¹ An update of job descriptions are under the full responsibility of managers, who have to review JD every 4 years.

42. The two panels³² had the role of reviewing staff member's profiles and expressions of interest as well as the matching proposals submitted by Sectors/Bureaux. The Mobility Review Panel (MRP) deliberated for P1 to P4 levels and the Senior Mobility Review Panel (SMRP) for P5 and above. For the 2019 MMP, all reassignment recommendations of the panels were arrived at by consensus. The ADG/ADM and the DG took a decision on the recommendations of the panels (See Table 6 below).

Table 6. Composition of the mobility review panels

Composition of the mobility review panels	
Mobility Review Panel (P1-P4) 6 members	Senior Mobility Review Panel (P5 and above) 5 members
Director of HRM-Chair	ADG/AM-Chair
Director/Head of Field Office (P-5 or D-1)	Director of HRM
Member of Programme Sector (P-5 or D-1)	ADG PAX
Member from a Corporate Service (P-5 or D-1)	Programme ADG
Member of each staff association (2)	DIR CAB
Discussed 75 staff members' profiles against 83 available posts	Discussed 23 profiles against 30 available posts
Final approval	
ADG/ADM	DG

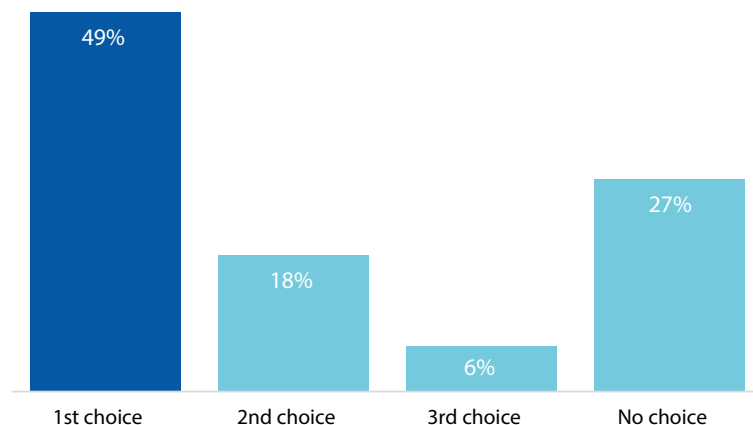
43. To arrive at a reassignment recommendation, the panels reviewed the proposals submitted by Sectors/Bureaux, staff profiles and their expressions of interest and their performance evaluation reports. The mobility policy³³ indicates that priority consideration, on the basis of equal competence, will be given to staff who are due to move, then to staff who have expressed interest in posts advertised but who have not yet reached their SDA. Furthermore, the policy states that the classification of the staff member's current and previous duty stations will also be taken into account to ensure a balance between successive assignments.

³² The Director-General appoints the members of the Panels (and their alternates) for a period of two years.

³³ HR Manual Item 5.10.

44. As seen in Figure 8 below, in almost half of the cases (49%), the decisions by ADG/ADM or the DG awarded staff members their first reassignment preference. In 27% of cases, either staff did not indicate any preferred post or they were assigned to posts for which they did not express an interest. A total of 12 staff members did not express interest in any position of whom 4 were reassigned and 8 remained on their posts. Ten staff members were not matched/assigned against any of their preferred choices.

Figure 8. Reassignments against preferred choices of staff



Data provided by HRM

45. Some ADGs and receiving managers considered they had not been sufficiently consulted during the review exercise. In a correspondence from March 2019, all Directors from the Arab region requested, “to be part of any mobility of office staff to and from their office” but ultimately felt this had not been realized. Field Office Directors expressed disbelief that as receiving managers they were not asked their views about possible candidates and felt sidelined from decisions that would ultimately affect their performance as a Director/Head of a UNESCO country team. Some managers indicated that at least informal conversations with staff matched to their office would have been appreciated. Indeed a group of staff also mentioned they were surprised at not having any contact with potential future supervisors.

46. Three Sector ADGs and one Director indicated that the Mobility Review Panel lacked a full overview and understanding of sectorial and programmatic needs resulting in less than ideal reassignment recommendations. One Sector claimed that in their view the Mobility Review Panel did not heed its recommendations and therefore in almost one-third of decisions related to their Sector there was a discrepancy between the competencies needed for the post and the person matched to the post. A number of staff members reflected that there is a need for a more informed, data-driven matching process which could include the development of a mapping covering UNESCO’s staff member’s competencies and expertise and Field Offices specific expertise requirements.

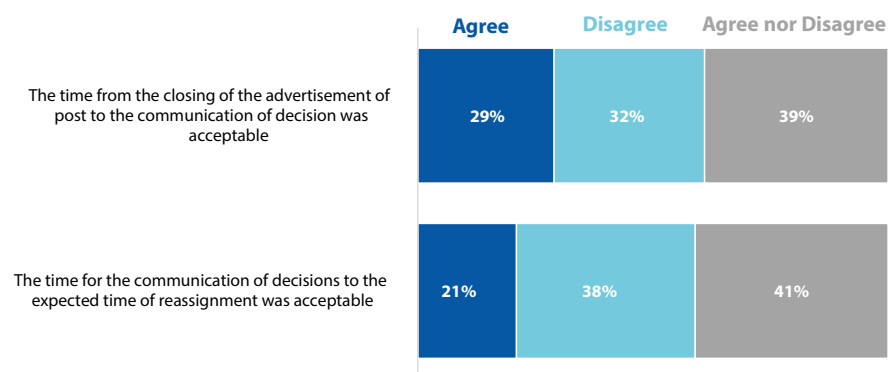
Key lesson learned: The review and matching phase resulted in a number of “mismatched” moves with people assigned to posts for which they do not necessarily have the requisite technical backgrounds.

Decision/Notification Phase

EQ: How well was the notification process conducted?

Key finding: Staff were very dissatisfied with the timing of the notification and considered unrealistic the time provided to assume the new assignment as part of managed mobility.

47. HRM delivered the notices of reassignment for staff in July 2019 with an expectation to move to the new posts by 1 October 2019. In interviews and both the STU and HRM surveys staff clearly and unequivocally expressed dissatisfaction with the timing of the notification. Staff also insisted that the expectation to move in three months was unrealistic and produced high levels of stress and anxiety. With such a compressed schedule and with notifications coming in July, some staff with children in the northern school cycle faced problems with tuition payments as well as with securing slots in schools in the new duty station. Further, staff recounted the uncertainty of not knowing until late whether the decision would be reassignment and therefore spouses would be required to leave their employment. Survey results also mirrored this dissatisfaction. Twenty-one per cent of respondents believed the time from notification to reassignment was acceptable but 38% viewed it as unacceptable.

Figure 9. Decision/Notification Phase - responses from the HRM Survey

Key lesson learned: A timetable for managed mobility providing 3 months from notification to relocation was insufficient.

Relocation/Transfer Phase

EQ: To what extent did staff members who participated in the mobility exercise benefit from the new support measures? How do staff members rate their client satisfaction with HRM in their relocation/move?

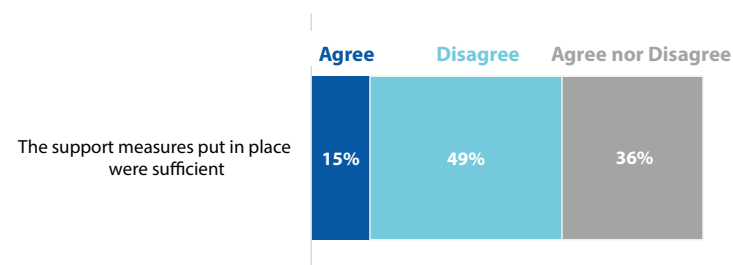
Key finding: Staff satisfaction with the support elements of relocation was low.

48. The goal of relocation was to concentrate moves in October, but in actuality, the period was spread out for more than six months with some staff members moving until February 2020. As described previously the timetable was unrealistic.
49. The new mobility policy includes elements for improved staff installation and spouse and family support to ease the transition such as 5 working days of special leave with full pay to assist with installation and assistance with spousal employment. It also includes a financial mobility incentive.³⁴ An email from HRM, sent after reassignment notices were issued, pledged to “continue to accompany you throughout this pre-departure stage and during the transition phase when you take up your new role.”³⁵

³⁴ The General Assembly approved an increase in the lower limit of the mobility incentive from \$6,500 to \$6,700 per year, as part of a recalculated mobility incentive matrix, with effect from 1 January 2020. IC/HR/71.

³⁵ Email to staff after reassignment decision. HRM.

50. However, information gathered from interviews and the HRM survey, describe long wait periods to obtain answers from HRM and incomplete or inexistent information packages on new duty stations. Interviewees described difficulties in finding information on practical and concrete questions surrounding their moves and feeling alone in the process of understanding conditions in their new duty stations and aspects such as schools, lodging and security. This situation is partly due to the fact that once the mobility team finalized the decision-making process, the transfers were implemented through regular HR and MSS support. The number of reassignments clogged up the existing system as the additional workload was significant.

Figure 10. Relocation/Transfer Phase - responses from the HRM Survey

51. Another problematic element were the raised expectations on the extent UNESCO would be able to assist with spouse employment. The policy states that, “HRM will provide assistance in the form of information and guidance on spousal employment and will, to the extent possible, facilitate the assignment in the same duty station of staff members who are spouses.” According to staff, this support did not materialize.

Key lesson learned: Managed mobility needs to factor in the additional workload for other services involved in the moves. A significant increase of moves to accomplish in one month can overwhelm existing support services. The MMP needs to have a holistic view of the mobility including planning, placement and relocation and the resource required to facilitate a smooth process have to be considered from the outset.

Key lesson learned: Spouse employment requires more than good will. It requires compendiums, contacts in field offices and HQ where spouses can inquire about job conditions, a list of countries where spouses are able/not able to work, engagement within country teams to provide for spouse employment and opportunities across international organizations.

D. Outcomes of the mobility exercise

Career development prospects

EQ: To what extent does or will the mobility programme, as currently envisaged, support the career prospects of staff?

Key finding: For some, mobility contributes to career progression by providing new experiences but others contend that when confined to the same grade, mobility does not further career prospects.

52. IOS conducted 58 interviews and 49 shared their views on the linkages between geographical mobility and career development/ career progression. Twenty-one respondents acknowledged that mobility has the potential to enhance their career or the career of staff in general. The most often cited reasons were that moving to other duty stations promotes learning new things, becoming more adaptive, and gaining new perspectives and competencies, which, in turn, improves future employability. Indeed one of the reasoning of the MMP is that professional growth is more difficult when a person stays for prolonged periods in the same post, with very similar responsibilities and tasks. At the start of the mobility programme in late 2018 UNESCO professional staff had been at their same post an average of 6.6 years.³⁶ During interviews, staff who had worked at multiple duty stations shared how working in multiple locations was key to gaining an understanding of the specific challenges and dynamics of UNESCO as a whole.
53. The positive perspective of mobility on career progression was more common at the level of ADGs and Directors with 14 out of 25 sharing this view, but only 7 out of 24 staff. Eighteen interviewees advanced the opposite view that mobility would not help or could be detrimental to their career prospects. Some explained that moving was (or could be) a backward progression as it would entail working in an area unrelated to their professional field. Some interview respondents described how mobility as currently envisaged appears to lock them into a never-ending process of moves at the same level. Others noted that geographical mobility as it was implemented in 2019, focused on moving people but was delinked to a more holistic framework of talent management that includes conversations with supervisors and HRM on career prospects and planning for training or reskilling.³⁷

³⁶ General service staff have an average of 9,4 years in the same post.

³⁷ AC/HR/72. In the new performance management policy performance reports are taken into account in extending appointments of staff members, granting within-grade salary increments as well as in relation to the recruitment, promotion, transfer and mobility of staff members.

54. A recurrent theme from interviews as well as in the open-ended responses from the STU and HRM surveys is that managed mobility limited to equal grade fails to play a role in promoting the career development of staff.³⁸ Indeed interviewees from all levels, from ADGs to staff at P2 level considered that it would be advantageous to have a mobility scheme that contemplates the possibility of expressing an interest to a post at a higher grade. If no other candidate is found at the same grade then the pool from a lower grade could be considered. Some interviewees indicated that this could help alleviate part of the problem of posts not filled through mobility.
55. UNESCO is not alone in the United Nations system in restricting the possibility to apply to a higher post through managed mobility; this is the case also in FAO and WHO, and in the currently paused managed mobility and career development framework of the United Nations Secretariat. As seen below, some organizations such as WFP and UNICEF integrate this possibility in the context of rotation or managed mobility. Both of these organizations, however, have a much larger workforce and network of Field Offices than UNESCO. In FAO, mobility increases the chances to get promoted and is a requirement for promotions to a P5 positions similar to UNESCO where the policy states that promotion to P4 and above, require the completion of at least one geographical assignment. This condition had already been present in previous UNESCO policies but had not been consistently applied. It is now slated to start as of January 2021. In UNFPA with a numerical workforce more similar to UNESCO, staff can apply to a post at a higher grade but if considered must go through an assessment that can include exercises, tests and /or interviews.
56. Enforcing the condition of mobility for promotion would be a strong incentive for staff interest in being part of mobility. However, the condition of mobility to attain promotion also raised some potential gender concerns. The greatest proportion of staff who have never undertaken geographical mobility in UNESCO is at the P3 level.³⁹ In UNESCO at P3 level, there are slightly more women than men.⁴⁰ A perception of a few interviewees is that women might have more constraints to move a family geographically and therefore in the future (once this element is applied) might find it harder to achieve a promotion.

³⁸ The mobility policy could not contemplate this possibility. The current procedure, approved at the 38th General Conference, require that a promotion through appointment to a higher graded post be subject to a competitive process and vacancies opened to staff members and external candidates at the same time. Prior to November 2015, all vacancies (except Director posts) were advertised internally first, before being advertised externally if no suitable internal candidate could be identified.

³⁹ Memo from HRM Director to the DG on Updated Mobility Policy, 2018. HRM/PPL/2018/VM/0609.

⁴⁰ Gender parity as of 31/12/2019. At P-3 level it is 52% women and 48% men. At P-4 level 51% women and 49% men. Parity falls drastically at P5 level. It is 30% women and 70% men.

Table 7. Mobility policies in the United Nations system

Organization	Policy on mobility and promotion
UNESCO	Mobility at equal grade.
UN Secretariat	Mobility at equal grade. ⁴¹
WHO	Mobility at equal grade.
FAO	Mobility at equal grade.
UNICEF	If staff apply to 5 posts, up to 2 at higher grades.
WFP	If staff apply to 3 or 4 posts, 1 can be at higher grade If they apply to 5 posts, 2 can be at higher grade Up to P4, if people are assigned to a position at a higher grade they are not being promoted. From P5, they get a temporary promotion.
UNFPA	Staff can apply for up to 5 posts, 1 can be at a higher grade If a staff member applies for a higher grade there is an ad-hoc virtual assessment.

Adjusted from a table in Summative evaluation of the implementation of the WHO Geographical Mobility Policy during its voluntary phase, Volume 2: Annexes.

57. The prospect of including promotion as part of the managed mobility exercise speaks to the need to link mobility with more concrete incentives. Some interviewees provided examples of enticements linked to career development that other agencies use such as in-step increments, temporary promotions or promotions only at field locations. A number of interviewees also mentioned the possibility of temporary field placements as a way to obtain mobility while providing career experiences for staff.

Key lesson learned: Mobility must provide incentives and motivation. A mobility exercise that does not allow for applying for higher grades or is clearly linked to career development will lack support and risks that some staff members leave the organization for higher-level posts and recognition.

41 Managed mobility is currently paused at the United Nations Secretariat.

Expertise

EQ: To what extent does mobility influence the availability in Sectors, Field Offices and Institutes of high-level expertise? Does mobility support or hinder the type of technical specializations required in UNESCO?

Key finding: *There are mixed views on the importance of guarding the specialized expertise of staff members; some highlight that it is one of the comparative advantages of UNESCO and a source of credibility while others point to the need to be more multi-disciplinary, particularly in the field.*

58. One core question for UNESCO as a specialized agency⁴² rests on the type of workforce required to provide sustained, quality support and advice to Member States. UNESCO Programme staff have tended to remain in the Sector to which they were recruited and, for the most part, have backgrounds with some degree of subject matter speciality in one of the five Programme Sectors and IOC. During the 208th session of the Executive Board Member States and Staff Unions raised concerns regarding the potential impact of managed mobility on the expertise and technical specializations of UNESCO staff. Managed mobility programmes, both in UNESCO and elsewhere, involve a shared decision-making responsibility between Sectors and Human Resources. With managed mobility, decisions on when and where to move staff is based on a number of considerations and organizational demands, such as burden sharing, that are beyond a single focus on an individual's expertise. In interviews, IOS heard of concerns from certain staff and senior managers that these 'other' considerations might override the need to have specific expertise in certain places moving it to locations where it is less relevant or not fully utilised.
59. The interviews conducted for this evaluation with senior management and staff revealed non-homogenous perspectives on the consequences of managed mobility on expertise. Of the eight ADGs, two, as well as three heads of Field Offices maintained that UNESCO and other international organizations have changed and that whereas before it was possible to have specialists on a large number of topics this is no longer financially viable. Therefore what is required are effective programme managers who are tuned in to their fields of work and who have access and knowledge to networks and specialists and are able to bring them on board when needed. Further, what they see as important is staff who are adept at coordinating with other sectors identifying synergies both inside and, importantly in the current context of stronger country offices and UN Reform, outside with partner agencies of the United Nations system. Some pointed out this is de facto taking place in many of the field locations, which tend to be small and staff are obliged to cover multiple aspects of UNESCO's mandate.

42 In total there are 15 specialized agencies under the UN umbrella.

60. Two of eight ADGs conveyed that UNESCO should pursue some degree of mobility but that for a large number of staff (fewer staff than are currently involved) mobility should be pursued with caution as it means going against their expertise and poses the risk of individuals leaving the organization. Two ADGs as well as Institute Directors and Heads of Field Offices argued that staff who are generalists cannot provide the type of specialized support that Member States seek and for which UNESCO has a comparative advantage, further noting that if UNESCO is a specialized agency then it should offer specialized services. Two recent IOS evaluations found that partners consider one of the main strengths of UNESCO to be the technical knowledge and expertise of its staff.⁴³ To bolster this point, some staff with experience in field duty stations indicated that the added value of UNESCO and the basis for its credibility is to offer expert advice, which is the reason countries seek UNESCO, rather than other agencies that might be better endowed.
61. One ADG, as well as other staff interviewed stated that the goal of mobility is not to change the profile of staff from specialist or expert to generalist or multidisciplinary but to retain the expertise that UNESCO has and place it in different locations. With this approach, neither the staff member nor the organization loses the expertise with a move and that expertise is simply located somewhere else. Not everybody agreed with this approach, some respondents argued that certain high-level expertise is better kept at Headquarters or in Institutes where it can serve the entire organization and not only one country or region. A good number of interviewees called for a better understanding of where and with whom specific expertise lies in UNESCO. According to some interview respondents at some point a mapping of expertise was begun in the organization but IOS could not locate this past endeavor.
62. Some senior managers, both in Headquarters and in the field indicated that mobility had not had an effect on delivery or that it had been minimal. Others stated it was too early to have a full picture of the consequences of mobility on delivery. A number of managers, however, conceded that managed mobility was having or had had a negative impact through longer than normal vacancies for the posts that were not filled as part of mobility. The managed mobility exercise was not able to fill 54 positions (including posts of volunteers). Once mobility concluded these posts were advertised internally and externally as part of a regular recruitment process. This meant that some posts had a longer than normal vacancy period which in UNESCO takes on average 185 calendar days (from advertisement date until the appointment decision). In interviews, IOS learned of concrete examples from a Sector as well as country offices in Latin America, Africa and Asia that had experienced disruptions from unfilled posts. One Director explained that in certain small Field Offices, there is little additional cover and long-term vacancies may risk internal control systems. One ADG described how a number of vacant posts had been “frozen” back in November 2018 in order to be included in the mobility pool; however, at the time of the evaluation they were still in the process of being filled.
63. In relation to delivery, some pointed out that the first managed mobility exercise with its very tight deadlines left little flexibility for handover periods. There were some good examples, for instance BFM accommodated AO training in Paris prior to placement. However, Directors and Heads of Field Offices stressed that particularly in the field, a handover process is necessary for credibility and continuity as the newcomer meets relevant government officials, partners and other stakeholders. Although in person handover is not always possible, different modalities including virtual process and familiarization visits should be explored. Both staff members and HRM mentioned short-term assignments as a possible mitigation measure to address staffing gaps that arise from mobility.

Delivery

EQ: How did the mobility of staff members, impact programme delivery in Sectors, Field Offices and Institutes? How do managers foresee that this mobility exercise and prospectively others in the near future will influence the performance of their Sector, Field Office or Institute?

Key finding: *Mobility contributed to longer than normal time vacancies, which together with inadequate handover processes may affect delivery*

Key lesson learned: Adequate handover provisions are key for a successful and effective mobility of staff. They can help prevent loss of knowledge and credibility with partners. They must be factored into the placement period or rather be effected beforehand. Short-term assignments may also be helpful to bridge potentially longer vacancy periods.

⁴³The Future of UNESCO's Education Sector: the normative vs operational role in the context of the 2030 Agenda 2030, 2020 and Evaluation of UNESCO's work in Preventing Violent Extremism (PVE) (forthcoming).

E. Main Conclusions

64. Overall, the response to the mobility exercise by both staff and managers was mixed, with important concerns raised based on the experience from the first MMP. At the same time, the majority of staff and managers acknowledge that mobility is a necessary element in building a UNESCO workforce that has a greater impact in line with United Nations reform and Agenda 2030. UNESCO needs to integrate managed mobility, but it needs to reconsider certain aspects so that each successive iteration is improved.
65. The Bureau of Human Resource Management planned, implemented and delivered on one of its key strategic priorities, a multifaceted highly complex endeavor. This led to the reassignment of 51 staff and to an increase of overall staff movements in 2019 (adding both the managed and the non-managed mobility figures) in comparison to prior years. At the same time less than 45% of posts (51 out of 113)⁴⁴ listed in the compendium was filled by mobility candidates. The MMP did not set out a target of numerical moves but in interviews senior management pointed to a goal of 40 to 60, putting the 51 moves within this desired range. Nonetheless, there was a widespread perception that the exercise was undertaken in a condensed period and under pressure to deliver. Given the workload involved, this raises the question as to whether an annual mobility exercise is feasible.
66. There were staff members who felt that managed mobility, as it was implemented, generated negative impacts at both professional and personal level. To the extent possible such cases should be avoided by transparent communications with the staff members concerned, building in sufficient time and developing proper support during the process including during relocation. UNESCO rules that do not allow a MMP to integrate expressions of interest for higher-level posts limit the perspectives of career progression for staff.
67. Managed mobility introduced a level of formality and predictability to movement of staff already taking place. For the most part, this was welcome by the field while the response of HQ staff was more mixed. This may be due to the fact that fewer HQ staff have experienced mobility while many field staff have been part of mobility throughout their careers.
68. The planning period and its timing led to a number of difficulties for staff members. A notification of assignment in July and an expectation of move in October was unrealistic

⁴⁴ The 51 moves included those that opted in voluntarily but the compendium (113) did not include the posts of those that opted in voluntarily. If the posts of volunteers had been included in the compendium, the percentage would have been around 36%.

and lead to stress and negative effects for some staff members' family situation, including children's schooling and spouse employment.

69. The high number of deferments is problematic as it limited the number of posts in the compendium. Although there are criteria for operational deferments, many staff members expressed confusion as to why there were so many operational deferments in some Offices and none in others. This raises the question of whether Sector/Bureau/Institute were prepared for mobility and whether succession planning, currently done only sporadically,⁴⁵ could help in limiting the loss of capacity should the scheme continue in the same manner.
70. There were shortcomings regarding the efficiency of the exercise. In parts of the organization and in the field the MMP created disruptions and uncertainties, lengthening the vacancy period in situations where no placement was made and where the vacant position eventually had to be filled through regular recruitment processes. Time pressure to move disturbed in-person handovers in a number of locations leaving some new staff with little induction. The relative high number of non-filled positions⁴⁶ that had to be subsequently advertised for internal/external recruitment raises the questions whether these positions should have been in the pool and why it was difficult to find suitable staff to fill them.
71. The lack of broader consultation with managers limited in some cases the right placements. Senior managers, including Directors of Institutes and Field Offices, received little or no information on who they would be receiving in their teams until after final panel recommendations had been approved. In a future iteration, therefore, Sectors will need to be more proactive in liaising with relevant Field Office and Institute Directors. Some managers complained that they lost valuable expertise since they had not been consulted when the list of eligible staff was drafted and thus could not intervene to ensure essential expertise was retained. This can be disempowering to managers who are accountable for delivering UNESCO workplans and programmes, and risks disruption of key programmes. The sustainability of the MMP cannot be guaranteed unless there are incentives for staff to participate in the scheme such as opportunities for promotion, opportunities for preparing for the new position, and training and reskilling. Not doing so risks losing talent.

⁴⁵ A workforce planning pilot was implemented by HRM in 2019 in one of the Sectors. The aim of workforce planning is to reduce staff shortages, recruitment timelines and ensure staff receive the right development and learning opportunities. It also aims to cut down and lower staffing gaps and blocks to career advancement.

⁴⁶ 28 - from compendium at the P1-P4 level, 8 from compendium at the P-5 and above level and 14 volunteers.

72. In conclusion, while this first phase of the managed mobility exercise at UNESCO encountered a number of difficulties and shortcomings, these can be actively addressed. Mobility is an essential element of a global international workforce and UNESCO should resume managed mobility. A revised MMP should be strategic, focus less on processes and more on people and provide clear incentives and support. It should build its approach around empowering staff to take the right career choices, build capacities for future career moves, including short-term assignments and placing staff in the right place, both from the perspective of the staff member and the Organization.

F. Recommendations

Recommendation 1 – Resume an improved MMP

This should take into account all of the steps involved in a well-planned geographical mobility exercise, appropriate incentives and relocation support. It should also include a more thorough costing of the exercise and potentially include familiarization visits or training requirements. HRM might want to consider implementing the managed geographical mobility every two years rather than annually, as currently envisaged.

Recommendation 2 – Continue to highlight links to strategic transformation and United Nations Reform

The communication strategy needs to review the most successful modalities from the first exercise and building on these further emphasize the strategic and overarching reasons for mobility- be better able to support countries with Agenda 2030, and be an active participant in United Nations reform.

Recommendation 3 – Review posts not subject to mobility

Although the review of the list of posts not subject to mobility is due until next year, consider reviewing it before the next cycle, looking closely, among other aspects, at the posts that could not be filled in the first round on account of an absence of equivalency in another duty station

Recommendation 4 – Review the deferment process

Personal/medical deferments are needed, however sufficient time needs to be accorded to a process that relies heavily on one individual (CMO and Staff Counsellor). The reasons for granting each operational deferment need to be openly and transparently communicated to all staff. HRM should monitor the numbers of personal and operational deferments in successive iterations with the goal of reducing them from the levels of 2019.

Recommendation 5 – Broaden involvement in review/matching

Reconsider the composition of the Mobility Review Panel and the Senior Mobility Review Panel aiming for more involvement of sectors and institutes who can provide insight and knowledge on the technical exigencies of posts. As part of workforce planning, map out the expertise in UNESCO identifying the skills or technical competencies required for certain posts or in specific regions/countries. Involve receiving managers by sending beforehand the list of candidates and profiles who have expressed an interest in posts under their supervision.

Recommendation 6 – Adjust timing on decision and notification

Establish a geographical managed mobility timeline that provides at least five to six months from the time staff receive notification to the moment they are expected to join their new assignment. Notification period should take into account school calendars and ideally avoid moves in the middle of the school year for families with children.

Recommendation 7 – Facilitate relocation

Prepare relocation packages for each UNESCO duty station. Develop checklists for staff members moving so that they know what steps are their responsibility and what processes will be assumed by HRM. Clarify in the policy, in a more concrete manner, how UNESCO can support spouse employment and have the staff resources and inter-agency agreements to back claims of support made in the policy.

Recommendation 8 – Ensure quality handover

Establish a mandatory handover process that includes ideally a face-to-face period or a virtual gathering with a discussion of a handover note. Consider producing a template handover note in the context of managed mobility. When face-to-face handovers are not possible, consider familiarization visits taking this into account when estimating the average cost of each move.

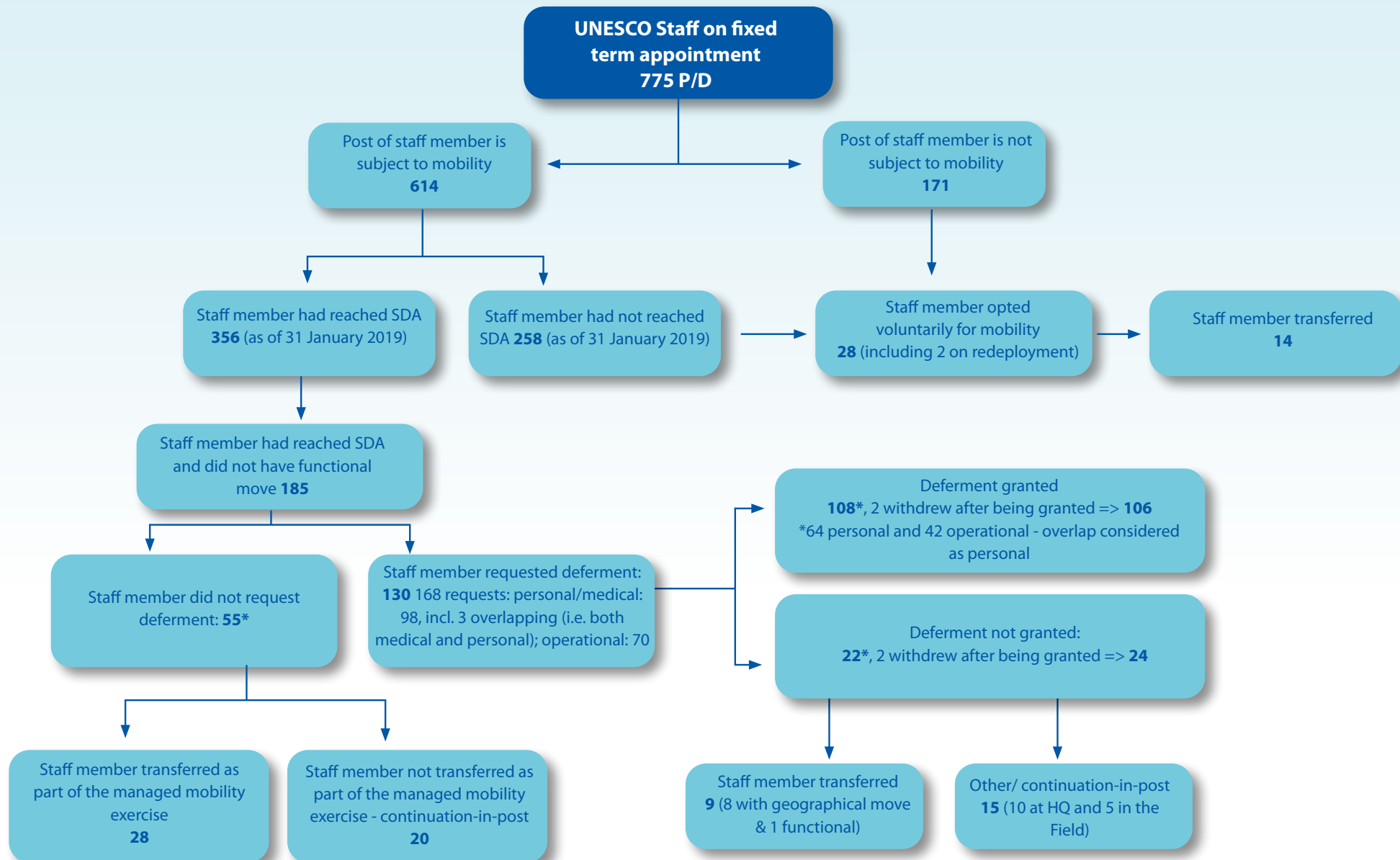
Recommendation 9 – Build in career incentives

Staff members should be allowed to express interest for at least one higher-level post. This will require an open conversation and discussion process with Member States with a view to reconsidering the General Conference decision, which requires all promotions to be subject to internal and external competition.

Alternatively, HRM should review other career incentives for mobility such as in-step promotions and temporary assignment taking this into account when estimating the average cost of each move.

Annex 1: Implementation of the First Managed Mobility Programme

(figures provided by the Bureau of HRM)



Annex 2: Terms of reference

Evaluation of the UNESCO Managed Geographical Mobility Exercise

Background

1. UNESCO has tried to implement mobility for its staff with varying degrees of success.¹ In 2009 the Executive Board “strongly supported the introduction by the Director-General of the policy of mandatory rotation for all international staff.” The Bureau of Human Resources Management (HRM) produced a strategy for the implementation of geographical mobility.² In 2015, UNESCO developed a new geographical mobility policy (revised in July 2016). Both the 2009 and 2015 policies were not implemented owing to budgetary restrictions.³
2. Internal mobility in UNESCO from 2014-2017 was, for the most part linked to recruitment as advertised in posts via a competitive procedure, although a fraction were also due to reorganizations.⁴ In terms of internal mobility, an external audit concluded that up to 2017 the modalities being used were unable to bring about a significant flow of internal mobility.⁵
3. The General Conference in November 2017 approved the UNESCO Human Resources Management Strategy 2017-2022 (HRM Strategy). The HRM Strategy has two primary objectives: i) the strengthening of staff capabilities for the Sustainable Development Goals and ii) the creation of an enabling and engaging work environment. The first

¹ 181 EX/6 The Board then invited the Director-General “to present to it at its 181st session a strategy for the implementation of the mandatory rotation scheme and a possible short-term mobility scheme with a view to meeting needs in the field, including an overview of the financial implications and cost-effectiveness.”

² The strategy foresaw geographical mobility mandatory and applicable to all staff at the Professional and higher categories.

³ 204 EX/21/ INF.6 Audit Report on the Internal Processes of UNESCO’s Human Resource Management. Audit External Auditor.

⁴ This was particularly true in 2014, when there was a major staff redeployment exercise following the budget cuts caused by the crisis of 2011.

⁵ The Audit proposed 2 recommendations: 1) conducting an annual review of staff to identify staff for possible transfer, and to identify managers demonstrating potential with a view to enrolling them in a career development programme; 2) holding one or two annual internal job opening campaigns to enable the Organization’s staff to position themselves as candidates for some of the vacant posts. The External Auditor further noted that promotion opportunities are motivating factors for mobility, suggesting that mobility campaigns should also offer such opportunities 204 EX/21/ INF.6.

goal speaks to the need to attract, retain and develop staff and the second to the development of an enabling and engaging work environment.

4. As a means to strengthen staff capabilities for the SDGs, the HRM Strategy defined the goal of implementing 12 human resources priority initiatives in a six-year period. Initiative 4 is mobility.⁶ According to the HRM Strategy, mobility enables staff to broaden their experience, skills and knowledge, supporting their career development and thereby allowing the Organization to have a more agile, versatile, broadly skilled workforce and permitting managers to have more motivated staff.⁷ The Bureau of HRM introduced the Mobility Programme as an integral part of the Strategic Transformation process with both a geographical mobility, for international professional staff (P and above level), as well as a functional mobility for both international, national and general service staff.
5. During 2018, HRM reviewed policies and processes and consulted with Staff Associations and the Advisory Council on Personnel Policies (ACPP). Between March and June 2018, it convened an Intersectoral Working Group to review a draft Mobility Policy. In December 2018, UNESCO presented its Managed Mobility Programme (AC/HR/65).⁸ The policy defined mobility as either geographical or functional. The first managed mobility exercise, the focus of this evaluation, was geographical. This type of mobility applies only to international professional staff (P and D). National officers and general services staff at HQ and in the field could voluntarily participate in the functional mobility exercise, set to begin in 2020.

⁶ Follow-up to Decisions and Resolutions Adopted by the Executive Board and the General Conference at their Previous Sessions Part IV Human Resources Issues 2017 EX/5.IV.B.

⁷ HRM Strategy.

⁸ As a result, the HR Manual introduced Item 5.10-Mobility, approved by the Director General. The changes required also revising related provisions of HR Manual Item 5.3 and 5.8.



Key features of UNESCO's **Geographical Managed Mobility Programme***

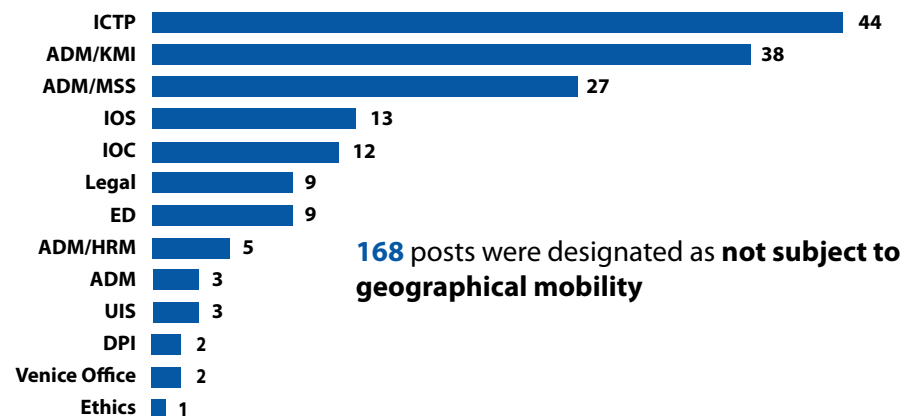
- » The reassignment is at equal grade.
- » Applicable to all internationally recruited staff on fixed term appointments.
- » Eligible staff members who have reached or exceeded their Standard Duration of Assignment (SDA)⁹ will be automatically considered for reassignment as part of the geographical mobility exercise.
- » Eligible staff members may voluntarily opt into the geographical mobility exercise.
- » Certain posts were designated as not subject to geographical mobility by the Director-General.
- » Staff members occupying posts not subject to geographical mobility may voluntarily participate in the mobility exercise.
- » There will be one geographical mobility exercise at the beginning of each year.

*HR Manual Item 5.10 –Mobility

6. In preparation for the first Organization-wide managed mobility exercise, from March through July 2018, the Bureau of HRM conducted a pilot mobility exercise of Directors and Heads of Field Offices who had exceeded their SDA. The pilot resulted in nine transfers.
7. The Bureau of HRM in consultation with Sectors/Bureaux/some Field Offices and approved by the Director-General, defined a list of posts not subject to the first mobility exercise. There were two main criteria for exclusion: The first, posts requiring specialized competencies and/or experience, qualifications and/or advanced levels of expertise in a technical field. The second, instances in which all the comparable posts were located at the same duty station.¹⁰
8. For the first mobility exercise, the largest number of posts not subject to mobility were in the International Center for Theoretical Physics (ICTP) followed by the Division of Knowledge Management and Information Systems and the Bureau for Management and Support Services.

⁹ The SDA, is the maximum period of time that internationally recruited staff members are expected to serve in a duty station based on its hardship classification by the International Civil Service Commission (ICSC). The SDA at HQ is 6 years. The SDA is calculated from the date on which a staff member is appointed on a fixed term post. Calculations on SDA start again if: i) a staff member change his/her functions within the same duty station; ii) the post is reclassified or downgraded; iii) the staff member is transferred at equal grade from one organizational unit to another; iv) the staff member is transferred with post from one Sector/Bureau to another; or iv) there is a transfer of the entire organizational unit due to restructure.

¹⁰ IC/HR/156.



9. For the implementation of each annual managed mobility exercise, the Bureau of HRM developed a policy involving five phases. The timeline of the first managed geographical mobility exercise took place as follows:¹¹

- i. **Planning Phase:** From December 2018 to February 2019. The Bureau of HRM identified posts to be included in the pool for mobility. The posts included in this pool were:
 - a. New posts established in the C/5 for the next biennium
 - b. Vacant and incumbered posts
 - c. Posts to become vacant due to retirement in the next 12 to 24 months
 - d. Posts subject to geographical mobility when incumbent reaches or exceeds his/her SDA.
- ii. **Deferment Phase:** From February to March 2019. Staff members or Sectors/Bureaux/Institutes could apply for deferment due to personal or organizational needs. Operational deferments were defined as non-renewable and not exceed 2 years. Once the deferment was approved, the post would not be advertised until the next mobility exercise.¹²

¹¹ Adjusted from: <https://en.unesco.org/unescocommunity/themes/unescocommunity/process-and-timeline>.

¹² The Chief Medical Officer (CMO) reviews applications for personal deferments for medical reasons and the Social Welfare Assistant for personal/family reasons. The Director of HRM reviews the recommendations and submits to the ADG/ADM for final decision.

iii. Advertisement of Mobility Opportunities Phase: From March to April 2019. The Bureau of HRM informed staff of the outcome of the deferment process and advertised the available posts. During the advertisement period, staff members were required to submit or update their CVs/profiles and asked to express a preference for up to three posts, of which one post could be within the same duty station.

iv. Review/Matching Phase: May 2019 The ADG and a subset of Directors of some Sectors/Bureaus/Institutes chaired the review sessions.¹³ These also included the Chief of the Executive Office or another senior staff and an HRM representative. The Chair submitted proposals for reassignment or for continuation-in-post to the respective Review Panels. The Mobility Review Panel (for P1 to P4) and the Senior Mobility Review Panel (for P5 and above) reviewed the proposals and made recommendations to either ADGs/ADM (for P1 to P4) the Director General, (for P5 and above) who then made the final decision on the reassignment or continuation-in-post of staff members.

According to the Bureau of HRM, decisions on matching of posts to individual staff members takes into account multiple factors. Some of these are operational needs, previous career mobility, staff member's preferences, skills and experience, as well as organizational stability and special personal/medical constraints. Priority for mobility is awarded to: i) staff members who have reached or exceeded their SDA at HQ and in the Field and had no previous career mobility and ii) staff in hardship posts.¹⁴

v. Decision Phase: July 2019. The Bureau of HRM notified staff members, ADGs/ Directors and receiving managers. HRM has further been communicated reassignments decisions upon formal move.

vi. Transfer phase: Staff members actually move and assume their new posts in a different geographical location. According to the Mobility policy, new measures were introduced to facilitate the transition of staff members (and their families) moving to new duty stations. These included a period of special leave of 5 working days with full pay and assistance in the form of information and guidance on spousal employment.

¹³ The Mobility Review Panel was composed of the Director of HRM, 1 Programme Sector Representative, 1 Corporate Service Representative and 2 Staff Association Representatives. The Senior Mobility Review Panel was composed of the ADG/ADM, the Director of HRM, the ADG/PAX and 1 ADG from a Programme Sector.

¹⁴ Hardship posts are D, E or non-family duty stations. The list of UNESCO duty stations was brought in line with the ICSC recommendations. <https://icsc.un.org/Home/DataMobility>.

10. During the period from 1st August to 31 October, 39 UNESCO staff members moved as part of the mobility exercise.¹⁵ After 31 October a further 12 staff members will move for a total of 51 UNESCO staff members moving as part of the first managed mobility exercise (see Annex 1).
11. After finalizing the 1st exercise, HRM undertook a review and identified a series of lessons learned which will be reviewed as part of the evaluation.

Rationale and Purpose of the Evaluation

12. In the 2018 UNESCO Staff Survey, respondents expressed a positive view on mobility.¹⁶ As an overarching concept, 84% of those who responded, strongly agreed or agreed that mobility is of great importance for the effective functioning of an international organization like UNESCO. In relation to career prospects, 76% believed that a mobility program is beneficial for career development at UNESCO and 73% concurred that mobility was important for their career.¹⁷ A somewhat reduced proportion of 69% said they would be willing to move to a different duty station in UNESCO in the next five years.¹⁸
13. Member States have also urged UNESCO to develop and implement a managed mobility programme. In 2018 at the 205th session of the Executive Board, Member States: reiterated the importance of the implementation of a robust mobility strategy in UNESCO that is mandatory and is accompanied by a strong career-planning tool.¹⁹
14. Staff unions have expressed their support for a mobility policy characterizing it as an opportunity to provide UNESCO staff with new professional experiences, while responding to the Organization's operational needs.²⁰ Throughout the process of design and implementation of the first managed mobility, however, staff unions voiced concerns. The two main criticisms were: i) Unclear criteria to decide on who moves and who does not move. ii) The absence of a clear link to career development. A staff survey developed and launched by STU indicated that a majority of survey respondents had been unsatisfied with the exercise.

¹⁵ Bureau of Human Resources, Staff Movements from 1 August to 31 October.

¹⁶ The survey fieldwork was undertaken between 31 January and 28 February. 1966 people responded to the survey out of a possible total of 3021, a response rate of 65%.

¹⁷ This question was asked to all categories of staff.

¹⁸ This question was asked only to staff in categories "D and above" and "P".

¹⁹ 205 EX/SR.6.

²⁰ STU Flash, 1st March 2019.

15. In this context, and following the implementation of the first managed geographical mobility exercise in 2018 and 2019, the Executive Board at its 208th session:
 - » Invited the Director-General to request IOS to undertake an independent evaluation of the first mobility exercise, its processes and outcomes and its effects on the availability of high-level expertise and career development prospects.
 - » Requested the Director-General to temporarily pause the managed mobility programme and present the results of the independent evaluation to the Executive Board at its 209th session for examination with a view to assess the need to fine-tune the mobility policy and to resume its full implementation at the 209th session.²¹
16. The main objective of this evaluation is to provide an evaluative assessment on the first managed mobility exercise. The results will provide inputs for discussions by the Executive Board during the 209th session. Furthermore, the Sector for Administration and Management and the Bureau for Human Resources Management can also use the results of the evaluation to inform potential adjustments and changes to the mobility programme. Other key stakeholders who may use the results of the evaluation are senior management in charge of the strategic transformation and the Staff Unions.
17. The Evaluation Office of UNESCO's Internal Oversight Service will lead the evaluation exercise. The Audit Office will provide support in the review of data. IOS will liaise closely with the Sector for Administration and Management and the Bureau of Human Resources Management.
18. IOS will identify a reference group composed of: representative(s) from the Office of the ADG of Administration, the Bureau of HRM, representative(s) from Sectors and Institutes and Field Offices and representative(s) from the Staff Unions. IOS will complete the evaluation by the end of February 2020 in order to provide the needed inputs to the discussions of the Executive Board.

²¹ 207 EX/Decisions.

Scope of the Evaluation

19. The evaluation will focus on the first managed geographical mobility exercise as it was designed, organized and implemented during 2018-2019. Given the short time frame to conduct the evaluation it will address other human resources issues and procedures such as recruitment, staff performance, or reclassification, only as they relate to the first mobility exercise. A number of these human resources issues were covered by and IOS Audit in 2015 and an Audit from the External Auditor in 2018.²²
20. The evaluation will focus overall on
 - » **The implementation process.** This will review the manner in which the Bureau of HRM in consultation and collaboration with Sectors, Field Offices and Institutes conducted the five phases of the mobility exercise.²³ Questions will seek to unpack each of the phases and involve questions on the method of implementation including communication, participation and transparency.
 - » **The outcomes.** This will review to what extent the first mobility exercise achieved its stated outcomes. It will also look into the effects of mobility on groups of staff members including on their career prospects and the effects of mobility on the capacity of Sectors, Offices and Institutes to deliver on their planned work plan.

Limitations

21. In order to present the results at the 209th session, the evaluation will have a limited time for data collection and data analysis. IOS will endeavor to reach the widest possible cross section of UNESCO staff as well as review relevant documents in a period of less than two months (December 2019-January 2020, see timeline below).
22. The evaluation will assess the outcomes of the managed mobility. However, these will be limited to immediate and shorter-term outcomes, as insufficient time has elapsed for a full assessment of the effects of mobility on issues such as career development and delivery of work plans.

²² IOS/AUD/2015/07 of September 2015, Audit Report on the Internal Processes of UNESCO's Human Resources Management, 2014 EX/21.INF.6, 2018.

²³ Staff Associations were involved in the Mobility Review phase as parts of the panel for P1 –P4 staff.

Key Evaluation Questions

23. The evaluation will aim to answer some of the questions below. These questions will be adapted after a brief inception phase during which IOS will consult with the reference group.
24. The implementation process:
- a. How do the staff members, subject to mobility, perceive the process, including communication at different stages and clarity about decisions?
 - b. **Phase 1:** How well was the planning phase carried out? What communication was provided to managers? How was the list of posts not subject to geographical mobility compiled? How did Directors of Sectors/Bureaus/Institutes participate in the planning phase?
 - c. **Phase 2:** How well was deferment implemented? How well was the timing and criteria for deferment communicated to relevant staff members? To what extent were the criteria for deferment clear to those who requested it?
 - d. **Phase 3:** How well was the advertisement phase carried out? How well was information and communication on available posts and how to apply provided to relevant staff members?
 - e. **Phase 4:** How well was the review and matching carried out? To what extent were decisions on matching carried out on the basis of a predefined, transparent set of criteria? How do different groups of staff members rate the matching process?
 - f. **Phase 5:** How well was notification process conducted?
 - g. **Phase 6:** To what extent did staff members who participated in the mobility exercise benefit from the new support measures? How do staff members rate their client satisfaction with the Bureau of HRM in supporting their move?
25. The outcomes
- a. To what extent did the first mobility exercise achieve its outcomes, as set out in the HRM Strategy?
 - b. How does managed mobility affect motivation and engagement through the work-life balance?
 - c. To what extent did the policy of deferment support staff with specific family and other considerations? To which extent was the exercise effective in achieving the rationale for deferment related to personal well-being? To what extent did it support operational related considerations?
 - d. To what extent do staff members, subject to mobility, foresee that the mobility programme, as currently envisaged, will support their career prospects?
 - i. How is the link to the original sector maintained? Up to now, how has the dual reporting mechanism, in the context of mobility, functioned (matrix system)?
 - e. How did the mobility of staff members, impact programme delivery in Sectors, Field Offices and Institutes? How do managers foresee that this mobility exercise and prospectively others in the near future will influence the performance of their Sector, Field Office or Institute?
 - f. To what extent does mobility influence the availability in Sectors, Field Offices and Institutes of high-level expertise?²⁴ To what extent does mobility influence the availability in Sectors, Field Offices and Institutes of staff with multi-disciplinary capacities?
 - g. To what extent does mobility support or hinder the type of technical specializations required in UNESCO?
 - h. In terms of costs incurred, to what extent is the managed mobility exercise viable on an annual basis?
 - i. What could be foreseeable consequences of indefinitely pausing managed mobility and reverting to “unmanaged mobility”

²⁴ Including in the International Hydrological Programme (IHP).

Methods

26. The suggested methods for this evaluation are the following: a desk-based review of a variety of documents, key informant interviews with a random selection of staff falling in different categories as well as other relevant stakeholders, a survey of staff affected by the first mobility exercise and a benchmarking with other managed mobility programmes in the UN system.
27. Staff fall into different categories, depending on whether their post was subject to mobility, they had reached their SDA, or they opted (and received or not) their request for deferment.
28. Data collection approaches will take into account these different groups with the goal of obtaining a thorough coverage of viewpoints and situations.
29. Categories of staff and mobility (for a visual manifestation of these categories please see Annex 1)
 - i. Staff members whose posts were not subject to mobility (168).
 - ii. Staff members who opted voluntarily for mobility (either had not reached SDA or post not subject to mobility) (28).
 - iii. Staff member had reached SDA and did not have functional move (185).
 - iv. Staff members who requested deferment (168):
 - a. 107 who obtained a deferment (63%).
 - b. 37 who did not obtain a deferment.
 - v. Staff members who did not request deferment (41).
 - vi. Staff member transferred as part of the managed mobility exercise (51).
 - vii. Staff member not transferred as part of the managed mobility exercise, (Continuation-in-post-34).
30. In the case of the group of staff who moved as part of this first mobility exercise (group vi), data collection will emphasize coverage of staff moving in all the possible directions (Field to Field; HQ to HQ; Field to HQ; HQ to Field; Institute to Field, Field to Institute etc.).²⁵
31. Key informant interviews
IOS will conduct interviews with the following groups:
 - i. Staff members in the categories outlined above. Given the short time span to conduct the evaluation, IOS will randomly sample individuals from the categories. IOS will work in close collaboration with the Bureau of HRM to obtain comprehensive lists.
 - ii. Staff members who participated with decision-making roles in mobility review panels and senior mobility review panels.
 - iii. Senior management (ADGs and Directors of Institutes).
 - iv. Current and former Bureau of HRM staff involved in the implementation of the first mobility programme, including the Medical Officer and the Staff counsellor.
 - v. Relevant senior level staff from the Sector of Administration and the Cabinet.
 - vi. Presidents of the two UNESCO staff unions (AIPU and STU).
 - vii. Selected Member States (the list will be defined at a later stage in coordination with the Bureau of HRM and the staff unions).
32. Survey
Both staff unions and the Bureau of HRM have surveyed UNESCO staff on mobility. In addition to the 2018 UNESCO Global Staff Survey and the STU survey on mobility from October 2019, the Bureau of HRM deployed a survey focusing on the 213 staff members who were part of the managed mobility exercise. IOS will review the existing data from these surveys and determine if gaps in data and information merit a further survey.
33. Benchmarking
Managed mobility programmes exist in a number of entities of the United Nations system. For example in agencies with a humanitarian profile, UNHCR has a mandatory mobility policy for international professional staff and in WFP, most international posts include a mobility clause and require staff to move every two to four years.

²⁵ As well as the different configurations, that include staff from the Institutes located in both Headquarter and other locations.

34. Benchmarking involves comparing UNESCO's mobility policy and practice (the first exercise) to those of other organizations. It will include reviewing the practices followed in similar agencies and appraising the practices of UNESCO. For the evaluation, the benchmarking will consist in reviewing the good practices from a UN agency with an established programme (such as WFP or UNHCR)²⁶ and an agency with a profile and field presence more akin to UNESCO (ILO/ FAO). The objective is to identify good practices that could be adjusted and adopted by UNESCO.

35. Desk review
The evaluation will conduct a thorough review of different documents related to the first managed mobility exercise. This will include communication guidance products from the Bureau of HRM at each phase as well as minutes and other documents of review panels.

The desk review will also revise other lessons learned documents from mobility programmes implemented elsewhere. For example, in the UN Secretariat a Managed Mobility Framework²⁷ was planned for a phased-in approach from 2016-2020. However, within the context of the United Nations reforms, the Secretary-General paused²⁸ the implementation of the Mobility Framework.²⁹ The General Assembly requested a Comprehensive Review of the Mobility Exercise to be presented at the 2019 General Assembly.

36. Review of the Theory of Change
The evaluation will review together with relevant stakeholders a Theory of Change for managed mobility. A Theory of Change is a representation of how an intervention (in this case mobility) is expected to lead to desired results. A simple depiction of a theory of change for mobility can be found below. This will be discussed and adjusted accordingly during the inception phase.

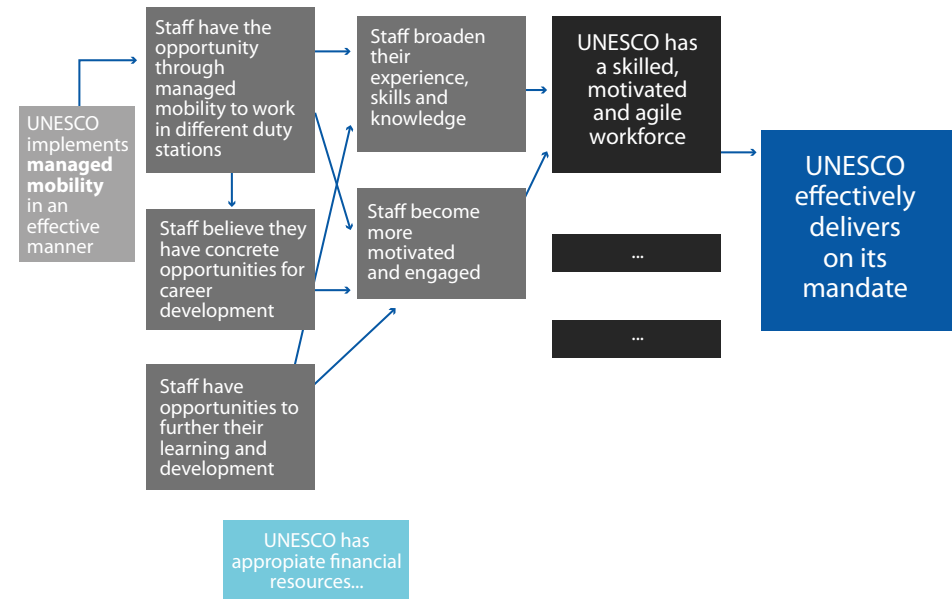
²⁶ With the understanding that WFP and UNHCR have a very different mission, field presence, operational capacity and organizational culture to UNESCO.

²⁷ General Assembly Resolution A/RES/68/265 of 2014 approved the refined managed mobility framework.

²⁸ The pause in the new system meant that no mobility exercise was launched in 2018 and no additional networks were phased into the new system.

²⁹ ST/SGB/2016/2/Rev.1.

Theory of change. Managed Mobility



Roles and Responsibilities

37. The Evaluation Office of IOS will conduct the evaluation. IOS estimates the evaluation will require around 40 professional working days. One IOS Principal Evaluation Specialist will lead the evaluation with support at different stages by the Audit Office and a junior consultant. The evaluation will take place between mid-November 2019 and mid-February 2020.³⁰

38. The evaluator(s) will comply with United Nations Evaluation Group (UNEG) Norms and Standards for Evaluation and UNEG Ethical Guidelines for Evaluation.

³⁰ This amounts to around 60% of the total workload of one IOS Evaluation professional in the aforementioned time.

39. IOS will deliver:

- » A final ToR. This will entail the agreed upon framework for the evaluation including (revised) key evaluation questions and methods as well as timeline.
- » A draft report. This report will be revised by the reference group.
- » Inf Note for the 209th session of the Executive Board.
- » Final report. In English and no more than 20-25 pages.

Proposed timeline

Activity / Deliverable	Date
Convene the reference group	Mid-November 2019
Finalize the ToR	Beginning of December 2019
Data collection: Interviews & document review	December 2019 and January 2020
Draft report	Early February 2020
Final report	End of February 2020

Selected Relevant Documents

Strategy for the Implementation of Geographic Mobility 181 EX/6

Decisions Adopted by the Executive Board at its 207th Session EX/Decisions Unedited, Paris, 25 October 2019

Audit Report on the Internal Processes of UNESCO's Human Resources management, 204 EX/21.INF.6

Follow-up to the Decisions and Resolutions Adopted by the Executive Board and the General Conference at their Previous Sessions, Part IV Human Resources Issues, 205 EX/5

Follow-up to the Decisions and Resolutions Adopted by the Executive Board and the General Conference at their Previous Sessions, Part IV Human Resources Issues, 207 EX/5

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