

**About a Think Tank from the Global South:
Assessing the Satisfaction of Cepei's Customers
as Required by ISO 9001 / Quality Management
Report**

(posted on www.guentherbachmann.de courtesy of Cepei)

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I Background and task

The Centro de Pensamiento Estratégico Internacional, Cepei, is a Global South independent think tank established in 2002 and headquartered in Bogotá. The founding idea was to create a special kind of knowledge and interaction that the founders felt was essential in the global context, but not yet sufficiently covered or provided for. This basic assumption turned out to be a value proposition that found more and more traction since the early 2000 years. For global agendas effective dialogue and multi-stakeholder participation are no tools that come natural or would exhibit some kind of self-regulation. They need professional science (data) and community based approaches.

Cepei created ideas and promoted purpose management, globally and within Latin America. With the UN 2030 Agenda, the Paris Agreement, the (r)evolution of the data industry, the buildup of a renewed necessity of multilateralism in a geopolitically changing world, and the ongoing UN reform processes, the strategic framework Cepei works in is maturing. New challenges and opportunities are meeting old weaknesses and procrastinated decision schemes. At the same time new strengths evolve and help strand old assets.

Growing in canvased scope, targeted relevance, and staff, Cepei decided to gauge and improve their performance. In order to ensuring they meet customer aims and stakeholder needs within statutory and regulatory requirements, and to better understand and implement their purpose and value proposition Cepei decided to start a strategic quality management process. Looking at the world's non-sustainable trends a growing sense of urgency added to this decision.

ISO 9001 is an internationally recognized standard providing the essential groundwork or management principles to ensure a continued high quality delivery of effective products or services. ISO is the name of the International Organization for Standardization. Worldwide, ISO 9001 is widely used and accepted, in particularly the private sector.

As a third party independent from Cepei, but following Cepei's work over quite some time, I was tasked with assessing how satisfied Cepei's main customer are with the performance of Cepei and its delivery of products. Carrying out a customer survey is a requirement of ISO 9001.

I have conducted in-depth interviews with

- African Institute for Mathematical Science, AIMS, Kigali, Ruanda
- Global Partnership for Sustainable Development Data, London, UK
- Konrad-Adenauer-Stiftung New York Office, NYC
- Tableau Foundation, Seattle, Canada
- Telefonica Hispam, Bogotá, Columbia
- United Nations Economic Commission for Latin America and the Caribbean (ECLAC), Santiago de Chile, Chile
- United Nations Environment Programme, UNEP (Programa de las Naciones Unidas para el Medio Ambiente, PNUMA), Panama City, Panama

Unfortunately, due to time constraints UN Headquarter was not available for an interview. However, the high level link Cepei has with UN HQ e.g. in terms of the UN reform debate was present in all of the interviews, and interviewees highly appreciated this kind of high level connectedness Cepei is maintaining over many years and is successfully using to advance the case for sustainable development.

I am deeply grateful to Luisa Cordoba, Cepei, for providing substantial background on projects and coopertions, for scheduling the meetings, and for taking the minutes.

II Findings

1. Overall, customers rate Cepei's quality as good to very good

With some minor nuances all interviewees confirmed that they understand the basic assumptions that Cepei builds into its work profile and performance. They welcome and share these as building blocks for their partnering. They appreciate the kind of relation they maintain with Cepei. Cepei's general proceeding fits very well with their partners. A positive impact in the world, learning from the work that Cepei is doing, and expanding globally - the three basics - are the better reflected the more a partner organisation itself exhibits some kind of self-reflection. This underpins Cepei's role as partner on equal footing.

All interviewees talked about Cepei in a warm and friendly way. Cepei's work for the UN is met with high approval and even enthusiasm

The mere fact that highest UN entities and staff in charge of the UN diplomacy rely on Cepei's findings and valuable input for the regional reform process finds high approval and is seen with enthusiasm about Cepei's standing and convening power.

2. Correspondingly high rating cepei' performance get in the subcategories as well.

Asked to rate the Cepei's quality on a range between 1 to 10 (10 being brilliant) interviewees unanimously grade on the high end of the scale (8/9/10; and some even north of 10).

Grades on professionalism, principles, timeliness and response time, product quality and clarity of either written or narrative reports did not deviate substantially from what interviewees presented as their general assessment. Cepei's responsiveness to the needs and issues of their customer was described as very good. It was said that this alone shows how well organised Cepei is and that comprehensiveness is an asset. Good responsiveness underscores and confirms the partner-centric approach which works for mutual benefit.

It is fair to assume that good grades imply that the partners would recommend Cepei to others. Some of them, if asked, confirmed this.

Some replies highlighted the right level Cepei choses for their written reports (financial and narrative): not too detailed and not too broad, and exactly what the donor / partner would need.

The professionalism of Cepei staff was never even second-guessed one single time.

All respondents confirmed their interest in working with Cepei again. The willingness to recommend Cepei to other interested parties is quite high.

Repeatedly expressed was that Cepei has very knowledgeable and good speakers. They add good value to important fora. That Cepei is often invited to such fora speaks for itself. The quality Cepei is managing to bring in into such fora materialises in comprehensive analysis, data processing, and actionable recommendations.

Interestingly, the conversation partners said that the personal exchange (director or staff) with Cepei is always important for them. This interaction is of high esteem. So, working with Cepei is more than just a transactional relationship. It is collaborative learning, according to some interviewees. Of central interest are Cepei' ties to high-ranking global politicians.

3. On our purpose, quality and role model

Interviewees could exactly describe what they think is Cepei's major identity or purpose. However, the respective answers mirror more or less the field of expertise those partners cover in co-operation with Cepei. None of them was fully aware of the much broader scope Cepei is working on.

Customers made the point that any organization involved in the data revolution, or/and actively facing the challenges of modern governance will be bound to a high quality of performance. It shall make intensive use of new technologies and shall constantly develop social skills. They need to adapt their purpose to changing contexts. For me, these are the ingredients of what Louis Meuleman, the Vice-chair of the UN Committee of Experts on Public Administration (CEPA), calls metagovernance.

It was highlighted that for a driver of action coming from the Global South is important. The Global South aspect helps building credibility and delivering the purposeful impact if (!) the internal management acts acted knowledgeably and prudently, and with the focus of mutuality. It has been repeatedly confirmed that Cepei's director and leading staff is maintaining this quality, even in stressful and pressing situations.

During the interviews I could not find out to what extent the different types of Cepei's activities fit together: acting as consultant, doing conventional advocacy, facilitating and convening multistakeholder dialogues as a reliable broker, providing data literacy services, empowering people, acting as a privileged partner to the customer. Some interviewees emphasized that, to them, the role of privileged cooperation partner is crucial, and kind of overshadowing the other role models. Mostly, however, the roles are simply placed next to each other without questioning their parallel existence. I heard a high appreciation for the work of Philipp Schönrock in particular.

This concept of multi-tasking is rather unusual in the worlds of large consulting firms and research institutions. I see it as something of a broker on the fringes of the self-imposed limits of conventional understanding of politics (and at the same time the self-inflicted wounds). Interaction not through academization, but through concrete measures by practitioners is urgently required. If this is successful, it will set standards for the interface between science and politics.

This multi-tasking functions as a backbone for Cepei's identity. This concept will be productive as long as Cepei, as an organization, can learn from these different types of activities and develop overlapping socio-technical skills. This recipe for quality management, if it is one, is of course also dependent on external circumstances that may come with reliability and credibility in democratic contexts.

It is a very valued enrichment that Cepei is able to ask the "elephant in the room" questions without being arrogantly putting itself on a moral highground. It is crucial for Cepei to maintain its independent voice and to make the concept of multitasking audible and better understandable - even though it might be a task hard to find serious funding for.

There also has also been a critical remark. It refers to (my term) overcomplexity. One voice uttered a sense of doubt whether at all the people can make sense of Cepei's overwhelmingly broad scope. For interested third parties it may be very challenging to understand and process all of the broad variety of Cepei's work across multiple regions and issue areas.

My commentary:

Complexity is not bad in itself, but needs appropriate narratives and quality management. Otherwise it may end up in what people feel is overcomplex, and that may disguise what Cepei actually stands for and what Cepei does. I heard some doubt as to the quality of narrated processes and whether those are managed effectively and with impact. I understand that any highly ambitious donor wants to see the difference in the world its grant makes. Answering this request by just adding another meeting will not do the trick. Our generation (me included) has over-conferenced nearly all pressing issues around environment and development in a way that not seldom the follow-up of a conference is seen in another conference. I have no doubt that Cepei is well aware of

this backlink's traps. However, I do see an increasing impatience around stakeholders. With the world running ever deeper into a delivery gap in implementing the SDGs a wave of fundamental refusal of conventional politics might wash away what we still see as high quality work.

4. Communication

Most of the interviewees are aware of the periodical information released by Cepei and use them as a standard way to keep track of what Cepei is involved with. However, due to time constraints, not all do so all the time. And some are not even bothering to read newsletters because they feel satisfied with the information they gather from direct contacts with Cepei. Some are not even aware of the fact that there is a newsletter on offer; they do not miss a formal newsletter.

My commentary:

The succesful diffusion of news via online media is not a guarantee. I would even argue that sending out newsletters generally is increasingly becoming a borderline business. That is primarily not a function of the newsletter's quality. It rather is part of how the social media are impacting any society's conversation. The original promise of a global village, the promise that started the global success story of the internet, has degenerated into the reality of limited reach or so called echo chambers.

5. The uniqueness of Cepei is undisputed and adds to quality.

Cepei is the only Global South think tank systematically monitoring the progress towards meeting the Sustainable Development Goals (SDGs) in Latin America and the Caribbean. Latin American think tanks, explained one interviewee, are frequently connected with universities or are part of global (northern) enterprises. By institutional constraints, both are not as productive and adaptive as Cepei can be. Cepei is well-positioned to convene and lead a multi-layer debate, one customer said, and this kind of debate is needed and requires high level internal quality.

Overall, there are not many think tanks in the world that are building common purpose data infrastructures and are becoming a data provider. Cepei generates and disseminates data-driven comparative analysis at the global, regional, national, and local levels, and it produces policy papers for decision makers, in particular as regards some of the international activities that attract the attention of almost all governments in the world, namely Voluntary National Reports (VNRs), the functioning of the UN Development System and also the one of the High-Level Political Forum (HLPF), and parts of the 2030 Agenda. Another feature of Cepei's unique value proposal are agility - as proven in the immediate build up of the data-service that is strenghtening the pandemic responses, and flexibility - as proven in the case of „crazy“ mandates when e.g. ad hoc travelling the world means to reorganise pretty much the whole rest of the portfolio.

In addition, a think tank from the Global South Cepei is different from a northern organization in particular by providing „neutrality“ and unbiased views. It was said that that opens doors in the South and the North as well. Another difference lies in the expertise of regional processes around the world and the access to experts (calling power).

Repeatedly people referred to Cepei's convening power that is, according to the interviews, outstanding when it comes to getting essential multi stakeholders to the table. Combined with Cepei's deep knowledge of global processes its excellent network of experts is a rare asset.

Another quite unique feature is the scope of expertise Cepei offers. Having reliable ties into the civil society and data communities in a number of states, and, at the same time, acting as an independent advisor to the UN (and being heard by the UN) is the result of permanence, credibility and tough approaches to cover new ground. According to the interviews it is well understood that Cepei worked

hard to earn these assets. Cepei's data dashboards improve the understanding of data for people who are not data professionals and whose decisions benefit from data-support tools.

From the interviews I learned that more think tanks are needed, especially from the south and especially with a) the competence to combine knowledge, out-of-the-box ideas with practical measures (the UN reform will never end, big data will be an issue of post-Covid development and in relation to the 2030 Agenda), b) an independent status, c) high connectivity. What I also learned from the conversations is that governments are expected to show an increased need for guidance (and this can be wishful thinking), but that the open box is the private sector. With regard to the private sector, there are several options for Cepei to connect and develop some lines of work, as well as some compromises that Cepei absolutely needs to be aware of. Many consulting firms are already reaching out to the private sector, but mostly in ways that are inconsistent with Cepei's style of work. Interestingly, one interviewee noted that Cepei should only then try to expand if its market niche is very clear, which according to this interview is not yet sufficiently the case. Another voice warned against expansion if the scope of the content is so wide that the customer community is wondering if such a wide scope could be real.

Therefore, Cepei must carefully process its selection.

6. Still, there is room for improving the quality management

Expectations are high. Accustomed to high rates of expansion Cepei delivered in the past people are eager to know what Cepei's plan is as regards data, VNR's (Voluntary National Reports on the implementation of the 2030 Agenda) and the Covid Centre, and what will come next in terms of financing and governance. When it comes to big data, the topics of Cepei's work are appealing, so it is not surprising that there is an appetite for even more analysis. It has been said that for maintaining high quality Cepei may have to look for links to other partners.

In general, Cepei's methodologies and approaches are being confirmed as solid in principal. However, there obviously are a couple of issues (respectively, have been in the past) where the internal quality management could even do better.

On the quality of the written reports the assessment is different. Most of the interviews confirmed that the narrative reports are good enough. Some would wish them to be more detailed and disaggregated - because the appetite comes with the eating.

Some written contributions could have been more informed and reports were said to lack disaggregating the empirical facts and presenting more innovative results. Sometimes they are too wordy („a little bit too superficial“).

Reports appear as too long even though the analyses is good and well structured. Long reports translate into more staff time involved which, for Cepei, may cause extra costs that are not calculated.

A resource person assumed that a report (in the referred case) actually seem to build on desk-research and not on carrying out realtime interviews (the latter had been commissioned).

Another opinion reported quite some delay in delivering products. Noting that timeliness is not a value in itself, but the partner organisation pointed out that delayed reports may miss a certain policy cycle (crunch time) and, so, may cause them to wait for the next appropriate opening to „sell“ the findings to decision makers. It was conceded that this kind of an uphill battle against (too) tight time schedules is often an issue that Cepei's customer are also facing or are causing to Cepei. But I also heard the assumption that, timewise, Cepei's working power might be overstretched.

The COVID-19 data and innovation center, which is recognized as a strong and important line of work, needs more clarity about what will happen next, what synergies can be expected and what innovations Cepei specifically offers.

Cepei could improve in terms of compelling and clear writing. This, for sure, is an useful advice to any institution.

One remark that I heard during the interviews addresses in a constructive way what Cepei could do to enhance its quality management in respect of timely product output. The interviewee proposes for Cepei to keep an eye on projects also after the „official“ closing of a funding period. It suggest follow up activities, such as de-briefing and monitoring. This, to me, seems to have great potential.

III And there are some elephant-type questions that only appeared while comparing notes from the interviews

Interviewees are very knowledgeable and interesting personalities. Their esteemed answers made me think about the questions I asked, and about the concept of quality as suggested by ISO. Here are some considerations that have not been in the center of the interview, but probably are of interest nonetheless.

1. ISO 9001 as a means to differentiate from the market or as internal feature?

Cepei's engagement in the QM process is something unique in the context of their partners and collaborators. Partners are rarely familiar with the ISO 9001 process. Interpreted positively, this is an opportunity for Cepei. It may help navigating new fields of customers. Cepei will hardly be able to directly capitalize on its implementing ISO 9001. At present (and certainly for some time to come) a QM system is not a primary criterion when donors decide on a donation.

The value of an ISO QM, for Cepei, primarily is internal. And QM is generally good preparation, if not a prerequisite, for reporting on sustainability. I support the development that civil society institutions and public institutions should also submit reports on their contributions to sustainable development and thus create the transparency that they rightly demand of commercial enterprises.

The quality of main aspects of management was never even doubted in the course of the interviews, such as leadership, inclusion of staff people in business development, systematic approaches to work processes, continuous self-empowerment, inclusive reflecting on purpose and mission, mutually beneficial relationships with partner institutions. That fact needs to be broadly communicated within Cepei.

I find that the customer's assessment of the quality of Cepei's performance, in a way, is consistent with the amount of donations or grants provided by the partner organizations: The higher the invested / donated funds, the better the performance was rated. The smaller the funds, the higher the expectations into Cepei seem to be. I am in no position to draw any serious conclusion and there are certainly many ways to interpret this phenomenon.

All customers value the conversation and contact with Cepei's director Philipp Schönrock. very highly. He is a sought-after interlocutor, not only in relation to the current projects, but also in general on political issues and social development at large. From the customer's point of view, this is a special quality. For Cepei this is an asset that internal quality management should use and (in the best sense) exploit. Of course, too much personnel focus would also mean a certain risk for Cepei as an organization. If one is aware of this and reflect on it internally, good quality management should be able to deal with it constructively.

2. How to deal with tacit quality features ?

Cepei works on the basis of some structural conditions that are seldom dealt with in the context of the quality management system, but are even more important for the perspective of an even more advanced quality. I suggest to term them „tacit“ in the absence of a better expression.

Any advancement of the internal quality management remains dependent on the income Cepei can ensure. I understand that Cepei's income over the last couple of years grew by an average of 25% per year, with the majority coming from a small number of partners. This is a convenient situation that must not be mistaken as a given. In the long run, however, it may also pose a risk for the organization's quality performance. A higher number of cooperation partners, as well as a greater diversification of income, would minimize it and probably have a positive influence on QM.

The majority, if not all, of Cepei's budget is being generated from commissioned projects. QM, however, is core expenditure that is hardly covered by project funding. The generally unfavorable legal taxation framework for civil society think tanks in Columbia adds to this budget issue. Both budget aspects need to be carefully evaluated in order to prepare for rationally editing choices for developing further the approaches to quality management. However, the mere fact that Cepei manages to care about quality management is good and, in itself, is a strong quality feature.

For the future of Cepei growth is an issue and an opportunity. It is an open question into what direction Cepei should and can grow, and what the possible trade-offs would be. Clearly, the two decades-long experience and Cepei's networks form a brilliant basis to step up in advocacy, consultancy and service providing. It may even appear tempting for Cepei to develop and own an exclusive self-imposed global agenda. Growing simultaneously into all directions of today's core business fields seems an option. It is most probable that this would require a radical evolution of Cepei's leadership and how it is organised. That is probably also true if Cepei opts for consolidation as a way forward. Cepei is in a good position to choose from the different options of flexi-pansion (a breathing combination of expanding, shrinking and consolidating that may change over time according to outer circumstances). Managing the quality of Cepei lies in the flexibility and the content-driven expertise.

Internal quality is one case, talking about it is another case. I understand the critical perspective of partners. The regular speak and communication style at high UN level differs from nearly all other contexts Cepei works in. Language and style are optimized for those political levels. But in other more pragmatic contexts other modes of communication are required. In my mind, this is not a matter of "bringing it down". Speaking to practitioners is not less ambitious compared to speaking to high level leaders. Complicating or simplifying things is a question of respect for the interlocutor and, of course, always a challenge for the technical jargon. Neither one should not be overused (overcomplicating, oversimplifying). It is essential to be aware of the differences in the audiences Cepei is speaking to. It might be sensible to check ways to re-package some elements of Cepei's expertise into chunks that can be expected to be more digestible and concrete and so connect with the context of partners.