SVP INDIA

SVP Engagement Framework

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The engagement framework is a how-to guide to drive partner engagements; delineating roles and responsibilities, specific processes, their outcomes and their associated tools. It seeks to help breakdown the larger partner engagement into specific achievable and measurable tasks across the engagement lifecycle.

The framework draws from SVP's core characteristics:

• We are a collective and work with diverse relationships. Being organised as a network allows for ease of access and visibility to available resources, expertise and knowledge.

• We are committed to solving a larger complex social problem with our time, expertise and resources.

The key players instrumental in making this happen are SVP Partners (philanthropists), Design Partners (social organisations), Consortium Partners (key institutions in the livelihood ecosystem) and the MJM Node.

Objective

- To create engaged & effective philanthropists in the livelihoods domain.
- To enable SVP(MJM) towards creating large scale impact in livelihoods.

The framework outlined below applies to engagements between SVP Partner Teams and Individual Design Partner Organisations.

Guiding Principles in designing the framework of engagement with individual Design Partners

1. Unfold: Working with a collective of diverse stakeholders in defining the social challenge. This requires deeply listening to design partners and committing ourselves to help them achieve their vision and goals. Also, key to unfolding is dialoguing amongst various stakeholders frequently.
2. Self-determine: Playing facilitative role in helping partners articulate and realise their best possible growth paths.
3. Iterate: Working with the spirit of experimentation and multiple actions bringing in agility to our efforts.

Framework Design
Section 1

There are three possible partnerships in the SVP Partner Teams and Design Partner universe

1. Newly evolving Partnerships - New DP: New LP team
2. Re-engaged Partnerships - Existing DP: Existing LP team revisiting their engagement to become more effective. It could also involve New LPs engaging with Existing DPs. It could also involve New LPs engaging with Existing DPs.
3. Fully owned Partnerships - Existing DP: Existing LP team with a history of successful engagement over time.

How the framework could be applied across the categories of partnerships

1. Newly evolving Partnership: Serves as a complete guide for understanding the organisation, planning, reviewing and implementation. It allows for constant action, feedback and course correction. It also offers effective documentation and measurement of impact.

2. Re-engaged Partnerships: It guides prioritisation of action plans, feedback and course correction along with effective documentation and measurement of impact.

3. Fully owned Partnerships: It offers a way to effectively document, measure and share impact of their engagement.

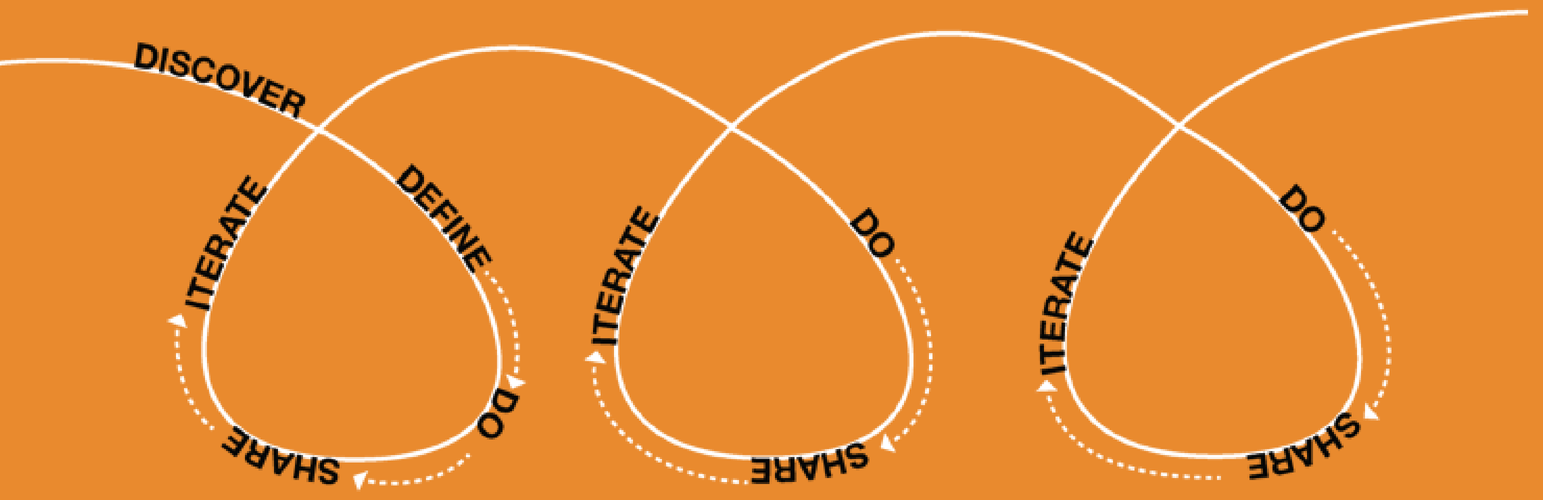
How do we organise ourselves internally?

Lead Partner Team: 3-5 SVP Partners willing to commit time to the Design Partner cause and help them grow.

MJM node and Chapter GMs: The MJM node has Interns, Researchers, Consultants and Project Managers to facilitate the entire engagement process. MJM node and GM are seen as working closely throughout the framework. In this document apart from certain specific mentions, the GMs have been considered as part of the MJM Node. The node supports Lead Partners to deliver throughout the engagement process. This implies taking complete responsibility for coordinating interactions between different stakeholders and using tools of the framework to extensively document the engagement.

Task Force: Comprises of a 5 member team drawn from DP (2 representatives), LP (2 representatives) and MJM node (1 representative). The Task Force is responsible for planning, implementing and iterating based on the agreed upon plan of action.

Overview Design Map



5 Key Milestones in the Learning Journey

Discover: Documenting the key insights about the organisation after a 360 degree understanding and analysis.

Decide: A Joint Action Plan between the Design Partner and SVP Partners that delineates key deliverables, activities in a timebound manner. It also records baseline data against each deliverable.

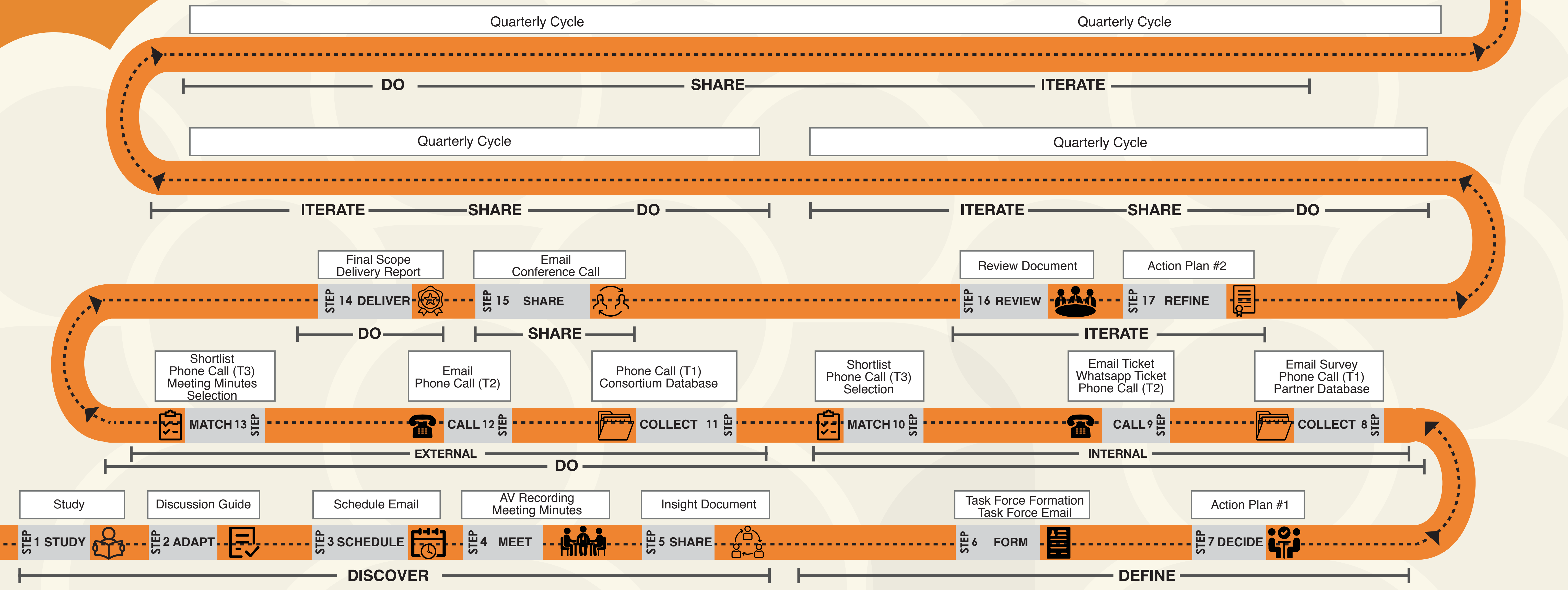
Do: Documenting the actions taken against each deliverables and its current status.

Share: Communicating with larger DP and LP group on key learn-ings from actions. Drawing patterns from multiple engagements to cross learn.

Iterate: Reviewing and refining the Action Plan periodically that aids more effective action with each cycle.

SVP INDIA

Process Map - Engagement Framework



A: DISCOVER

Step 1: STUDY

What does it entail

Understanding the organisation through secondary sources. Thorough secondary study, presentation and discussion of secondary insights

- Annual Reports – last 3 years
- Program Literature
- Journalistic articles and news reports
- Sector/Domain Reports (Skilling/Livelihood/Employability)

How do we do it

Go to variety of sources, open up multiple avenues to build a overall imagery of the organization- websites/ internet, library archives,organisation literature: Program Literature, Brochures, Youtube Videos and other publication

Who does it involve

Study Document to be filled MJM node and uploaded on a shared drive.
Study Document to be read by the Lead Partner team and the GM.
Presentation to be made by MJM node and discussed by all.

Process Outcomes

Study Document: Broad understanding of organisation's stated ambition, focus areas, theory of change, programmatic intervention, philosophical and value framework, organisation design (preliminary), funding portfolio, other partnerships, the livelihood domain(s) they are located in (skilling, micro enterprises, artisans etc.)

Timeline

In the first month of engagement

Tools

Study Template

Step 2: ADAPT

What does it entail

Adapting the discovery guide tool to facilitate rich conversations between the SVP Lead Partner team and various stakeholders of the Design Partner organization.

Who does it involve

- MJM node to create first draft
- Inputs from the Lead Partner Team
- MJM node to incorporate inputs for the Final Discussion Guide

The discussion guide is aimed at the primary stakeholders, leadership across functions and consultants to the organisation.

How do we do it

Develop clear lines of enquiry based on

- secondary research insights
- prior conversations with the Design Partner

Process Outcomes

Final Discussion Guides adapted for meetings with various members of the organisation.

Timeline

In the first month of engagement

Tools

Discussion Guide Template

Step 3: SCHEDULE

What does it entail

Create a schedule for meetings to understand the Design Partner organisation through the lense of various stakeholders. For scheduling we need to

- Clarify Purpose and Process of research with the Design Partner
- Negotiate lists of participants to get a comprehensive 360 degree view of the DP organisation
- Create an agreed upon timeline for the meetings
- Schedule one on one conversations

Who does it involve

Identify a single point of contact at the DP to coordinate the schedule, usually appointed by someone in a leadership position in the DP org.

How do we do it

MJM node to schedule and co-ordinate the meetings with the organisation and the Lead Partner Team

Send an email introducing purpose and process of meetings, required profile of people to be met – internal and external, and proposed timeline.

Process Outcomes

Calendared schedule of meetings with all stakeholders.

Timeline

In the first month of engagement

Tools

Schedule Email Template

Step 4: MEET

What does it entail

One on one in-depth conversations of about 1-1.5 hours using the Discussion Guide.

Meeting at DP premises and locations of work.

Deep listening and allowing for free-flowing conversations.

Who does it involve

Meetings with following stakeholders

- Primary stakeholder: end user of the program
- Second line leadership/function head
- Leadership: Founder, CEO, Directors, CXOs
- Collaborators: Advisors, Consultants

How do we do it

Meetings to be led by the Lead Partner team. One person to lead the discussion; MJM node member to take notes and add to the conversation when relevant. Meetings audio/video recorded if possible.

Process Outcomes

Recorded minutes of the meetings. Audio/Video recordings and photographs.

Timeline

In the first month of engagement

Tools

Audio/Video Recording

Discover Meeting Minutes Template

Step 5: SHARE

What does it entail

Documenting and sharing insights with the lead partner team and the design partner.

Who does it involve

• MJM node

• Lead Partner

How do we do it

• MJM node to create the first draft of Insight Document, get inputs from the Lead Partner Team and share the final version with the Lead Partners.

• Lead Partners to provide input and share the final document with the Design Partner.

Process Outcomes

Insight Document outlining the following

- In-depth understanding of the org- Genesis, Culture and ethos, Vision, Latent ambitions and potentials, Existing structure and processes
- Program level and Organisational level needs

Timeline

In the first month of engagement

Tools

Insight Template

B: DEFINE

Step 6: FORM

What does it entail

Creating a Task Force consisting of DP members, one LP team member and a representative from the MJM Node.

Who does it involve

- DP Leadership Team
- Lead Partner Team
- MJM Node

How do we do it

The Lead partner sends in a request to the DP leadership to recommend members from the organisation who can best represent the needs and help implement the plans. They also nominate the key partners who will champion the engagement from the SVP end. A mailer is then sent to all the members announcing the Task Force member names and objectives of the Task Force.

Process Outcomes

Formation of the Task Force by DP, LP and MJM node that will own and facilitate the engagement.

Duration

2 working days

Tools

Task Force Formation Template

Task Force Email Template

Step 7: DECIDE

What does it entail

Creation of Action Plan #1 based on commonly agreed areas of work as defined by the Task Force, scoping of the emergent areas of work and defining the parameters of measurement of outcomes.

Who does it involve

Task Force

How do we do it

From hereon the Task Force takes responsibility for creating and owning the Action Plan.

• Task Force to discuss priority areas emerging from the Insight Document and jointly decide the key areas of engagement, prioritise them and map what is possible to be delivered in the short term and long term.

• Initial scoping of specific areas of work which entails - detailing objectives, outcomes expected and timelines to be undertaken by the Task Force.

• Draw from the outcomes expected and derive a set of key success factors for each area of work. At this stage baseline data against each success factor is presented. This will enable measuring the impact or change created by the SVP support, post delivery.

• Circulate the Action Plan #1 to all DP leadership (if not represented adequately in the Task Force) and the larger LP and MJM node and incorporate the inputs with a sign off from the Task Force.

Process Outcomes

Action Plan #1 with objectives, activities, outcomes, resources and timeline. It details the scope of specific areas of work and highlights the key success factors.

Timeline

In the first half of the second month of engagement

Tools

Action Plan #1 Template

C: DO

1- Internal Route
2- External Route

Internal Route

Step 8: COLLECT

What does it entail

To create a dynamic database of SVP partners, complete with their areas of expertise and areas of interest in working with social sector organisations.

Who does it involve

MJM node along with the GMs of every SVP Chapter reach out to individual partners and conduct the survey and conversation.

How do we do it

A short survey could be mailed to every partner and followed by a detailed telephonic conversation. This is ideally done upon initiating a new member to the SVP fold. It needs to be annually updated to keep it relevant and current.

Process Outcomes
Active database of SVP Partners.

Timeline
Ongoing through the year

Tools
Internal Collect_Email Survey Template
Internal Collect_Telephonic Template (T1)
Internal Partner Database Template

Step 9: CALL

What does it entail

Specific Asks are drawn from the Action Plan#1 and a ticket in the form of an emailer is raised and sent to all partners within the SVP ecosystem. It needs to be followed with a call to specific partner with the requisite expertise as noted in the database.

Who does it involve

The LP team could reach out to the MJM node to raise the ticket.

How do we do it

The Lead Partner Team draws from the Action Plan#1 and internally raises tickets on specific deliverables. Specific deliverables should be documented with use of a ticket that will help measure the number of specific asks, both raised and later resolved by SVP. This implies, LP team who maybe able to fulfill the DP asks by themselves, should also raise a ticket and confirm the name of the LP who takes responsibility for fulfilling the task. In case the LP team is unable to fulfill the requirement, the ticket can be used to enlist other partners from the SVP universe.

Process Outcomes

Tickets raised against specific deliverables of DP Action Plan #1.

Timeline

First quarter of engagement

Tools

Internal Call_Ticket Email Template (An app at a later stage)
Internal Call_Ticket Whatsapp Template
Internal Call_Telephonic Template (T2)

Step 10: MATCH

What does it entail

Creating a longlist of internal SVP partners who have skills sets to match the requisite deliverables or have stated it as an area of interest. A short-list is then created to find the most appropriate match.

Who does it involve

The MJM node and the LP team works closely in finding the match.

How do we do it

The MJM node organises a short list of internal SVP partners who have skill sets to match the requisite deliverables or have stated it as an area of interest. In the case of multiple responses for fulfilling the requirements, Lead Partner Team needs to speak with all partners on the short list and identify the appropriate match for the Design Partner.

This could be done by telephonic conversations with the partners to discuss the requirement in depth, assess the expertise, time availability and resources required to decide on the appropriate match.

The MJM node will organise and coordinate the calls with the LP team and the other SVP Partners. In case, there is no show of internal partners willing to fulfill the deliverable, the LP team along with MJM will mark the ticket for external partners.

Process Outcomes

Identified suitable SVP partner who can fulfill the specific requirement of the DP.

Timeline

First Quarter of engagement

Tools

Internal Match_Short list Template

Internal Match_Telephonic Template (T3)

Internal Match_Selection Template

EXTERNAL ROUTE
Step 11: COLLECT

What does it entail

MJM node to collect a dynamic database of Consortium Partners, which are institutions of high repute and impact in the livelihoods ecosystem. This database should be accessible to SVP partners at all times.

Who does it involve

This pipeline will be created, kept warm and ready to access by the MJM Node.

How do we do it

This involves preliminary calls to introduce the idea of SVP-MJM and enrol them to be part of impacting livelihoods at the national level. A point of contact needs to be identified within the Consortium Partner organisation, which could be a person in their leadership. They need to be frequently spoken or written to, through emails on SVP updates, newsletters, events etc. It maybe useful to segment the Consortium Partners in a way that helps us identify which CPs could be brought to fulfill a certain requirement. For instance, they could be segmented as funding partners, advocacy partners or consulting partners. While some partners could belong to one or more segment, we could look to them for one kind of primary support, to begin with.

Process Outcomes
Active Database of Consortium Partners, which implies keeping a warm pipeline enabling access as and when required.

Timeline
Ongoing

Tools
External Collect_Telephonic Template (T1)
External Consortium Database Template

Step 12: CALL

What does it entail

Reaching out to external partners who have expertise or resources in supporting in the DP in fulfilling specific items on their Action Plans. A shortlist of suitable partners to be created and the appropriate match found.

Who does it involve

MJM node and LP team to work closely on finding the suitable CP. There could be readily available onboarded CPs who can be directly reached out to for the specific ask.

How do we do it

We can arrive at taking the requirements outside SVP in two ways: 1, after having exhausted the internal options 2, for specific items, such as funding, we can directly access ready CP. Calls to be made to appropriate external experts for shortlisting on specific requirements. Assess the external resources for interest, expertise and availability to shortlist and identify the suitable external resource.

Process Outcomes

Mails sent out to appropriate external partners, along with telephonic conversations on the desired outcome.

Timeline

First quarter of engagement

Tools

External Call_Email Template

External Call_Telephonic Template (T2)

Step 13: MATCH

What does it entail

Creating a short list from amongst the CPs who have expressed interest in working with DPs. The CPs will be met in person, with their point of contact and then introduced to the DP representative.

Who does it involve

MJM Node, Task Force and CPs.

How do we do it

Several external experts could respond to the mailer, requesting their support. The LP team then has telephonic conversations with each of the organisations and communicates the needs of the DP. A shortlist is then created based on the time availability, expertise and resources required by the CP in fulfilling the requirement. All the shortlisted organisations will be met in person and then introduced to the DP representative on the Task Force. The Task Force then recommends the final external expert to the DP organisation.

Process Outcomes

Identified suitable external partner/CP who can fulfill the specific requirement of the DP.

Timeline

First quarter of engagement

Tools

External Match_Short list Template

External Match_Telephonic Template (T3)

External Match_Meeting Minutes Template

External Match_ Selection Template

Step 14: DELIVER

What does it entail

Another round of scoping out of the work happens between the internal or external expert and the Task Force, with the Action Plan#1 as the basis of discussion. Together they define the specific objectives and then define the ways in which it can be fulfilled, given the timeline mentioned in the ticket. Additionally, they create the Delivery Report that provides the status update on each of the requirements in the Action Plan #1 and against the baseline data collected at the beginning of the engagement.

Who does it involve

The identified internal or external expert and the Task Force. MJM representative to the Task Force to create supportive documentation.

How do we do it

On finding the right match, the internal or external expert scopes out the work required to fulfill the objectives in Action Plan#1, by having in-depth conversations with the Task Force.The Task Force then agrees to the scope of work against specific objectives. The scope would include deliverables, defining the nature of engagement and the resources required. The nature of engagement could require one on one consulting by the internal experts, group workshops based on similar needs across DPs - branding, funding, HR etc. and facilitating interactions among the DPs who can then find synergies in their work.

MJM representative on the Task Force will document the actions, in a manner that specifies each item on the Action Plan #1 and mentions its status as - Not Initiated, Ongoing and Completed. This Delivery Report could provide insights into the processes and activities undertaken to fulfill the requirement; and clearly enunciate the numbers against the baseline data collected at the Action Plan#1 stage.

Process Outcomes

• Final Scope Document- details the scope of the work with the aid of the expert defining clearly the deliverables, nature of engagement and resources required.

• Delivery Report providing the status as well as movement from baseline.

Timeline

End of first quarter

Tools

Final Scope Template

Delivery Report Template

D: SHARE

Step 15: Share

What does it entail

The Delivery report is shared within the LP team and DP leadership, inviting inputs that feed into the document. It is then circulated within the larger SVP ecosystem on a quarterly basis. This could culminate in a call at the end of the quarter where every LP team shares their insights into successes and challenges with MJM node and SVP leadership team.

Who does it involve

MJM Representative at the Task Force coordinates all efforts between soliciting LP team and DP leadership feedback, and publishing and circulating the report. The call will be organised by the MJM node and facilitated by the SVP leadership.

How do we do it

The MJM representative at the Task Force coordinates the efforts of writing the Delivery Report, allowing for inputs to strengthen the document and thereafter circulating the report amongst the partners at SVP.

Some of the content which highlights success could be used for creating the outbound communication material for SVP. Each LP team consolidates their insights and presents it on a call to other LP teams, MJM node and SVP leadership. This serves as basis of cross learning and creating visibility within the system with regard to impact.

Process Outcomes

Coordinating two rounds of sharing- first with the LP team and DP leadership, Incorporating their inputs and recirculating it with the larger partner ecosystem. Curating content for outbound communication material on key success areas.

Call amongst LP Teams, MJM Node and SVP leadership at the end of every quarter.

Timeline

Beginning of the second quarterly cycle

Tools

Share_Email Template

Share_Conference Call Template

E: ITERATE

Step 16: Review

What does it entail

Review of the existing quarterly plan drawn from the Action Plan#1, based on actions taken, outcomes achieved and status of deliverables.

Who does it involve

Task force and the DP leadership.

How do we do it

The Delivery Report becomes the mainstay of the review process. The review is meant to bring together all stakeholders to think through the quarterly plan of Action Plan#1 and look into the actions taken and the status on all deliverables. The review could focus all discussions on understanding what has worked well for each deliverable that can then be taken across the organisation.Thereafter, it could focus on challenges the Task Force faced in achieving the set of outcomes.

Process Outcomes

A filled in review document complete with actions taken and descriptions of what worked and what did not work.

Timeline

One working day at the beginning of the second quarterly cycle

Tools

Review Template

Step 17: Refine

What does it entail

Refinement of the existing plan with additions of emergent areas and re-prioritisation of plans for the next quarterly cycle.

Who does it involve

Task Force with the MJM node Representative to play key role in anchoring and co-ordinating the meetings.

How do we do it

Post the review session, the members could continue with refining the Action PLan #1 for the next quarterly cycle or call for a meeting on a sub-sequent day (but close to day of review). Refining the plan brings focus to what worked well and ways in which it can be applied in other contexts, geographies or parts of organisations. It also brings attention to emergent areas which may have appeared as insights from the first quarter. It may allow us to course correct on methods which may not be working the way it was imagined to begin with.

Process Outcomes

Create Action Plan #2 as the quarterly action plan.

Timeline

Beginning of next quarterly cycle

Tools

Action Plan #2 Template

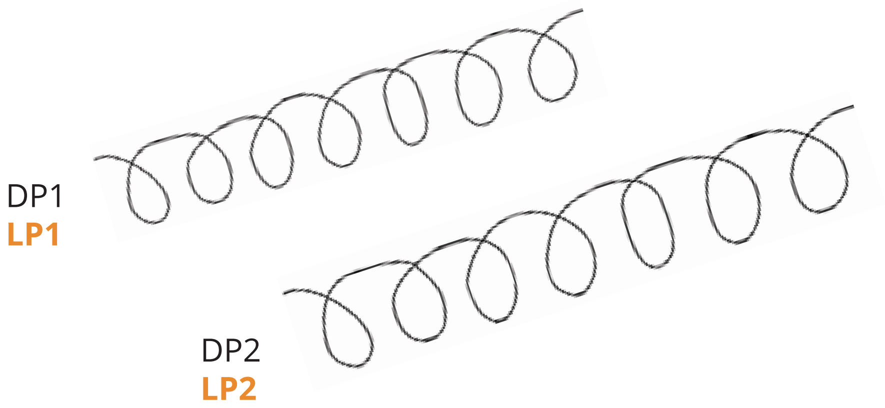
Every quarter experiences a cycle of Do, Share and Iterate which is anchored by the Task Force; and it continuously solicits and incorporates feedback, aligns the key stakeholders to the iterative plans, and extensively documents the process and the outcomes of change.

At the end of the fourth quarter (at the end of one year of work with the DP, a deeper review will be useful. Critical to this stage is assessing the shifts in aspirations, org structure, programme design and access to resources by the key function heads and leadership. It would be meaningful to understand any perceivable shifts in the primary stakeholder and DP relationships.

Framework Design
Section 2

The Spiral of Individual Tracks

• The model that we have described in Section 1 works on individual tracks of engagement between DP and LP.
• This works well to build trust, deepen relationships and allows the participants to start from where they are. However, the changes could be incremental and slow to come about.



Individual Org Tracks

Vortex of the Collective

• Drawing from deeper understanding of the individual tracks, a collective model of work has emerged. The DP needs could be categorized as specific to the organization or common across a few DPs. These common needs form collective areas of work or Centres for Action Research and Practice (CARPE), that could be clustered as

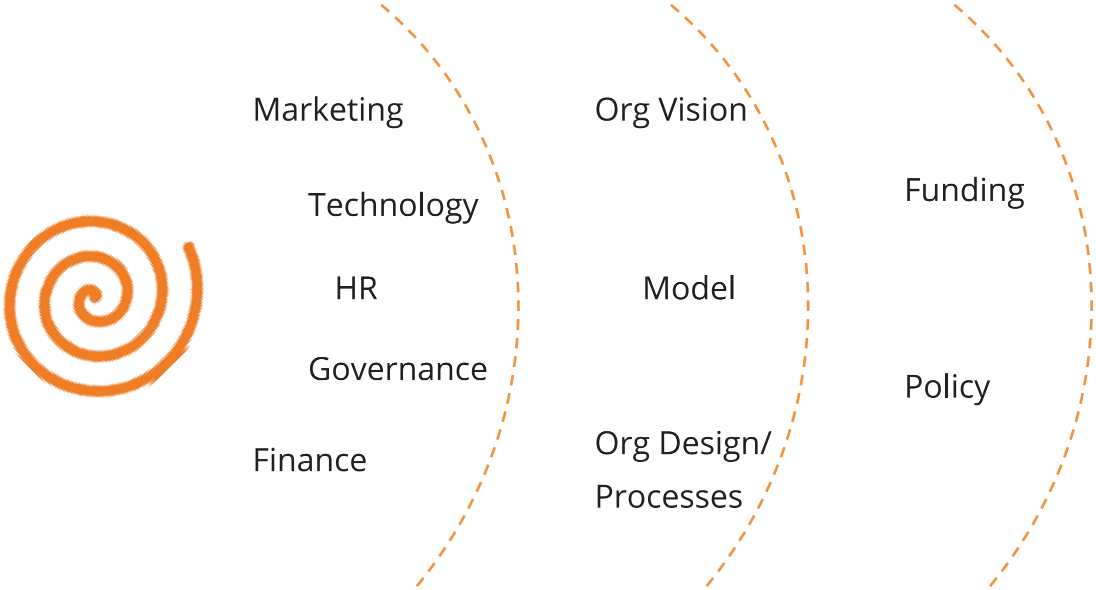
1-DP's core areas of work such as Org Vision, Model, Design and Structure.

2-Functional support areas such as Marketing, Technology, Governance, HR, Finance that enable DP's core areas of work.

3-Broader ecosystem development needs such as Policy and Funding.

• Organizing ourselves to address the collective needs will enable us to multiply the value we deliver to our cohort of Design Partners and thereby create large scale impact.

Vortex of the Collective



Collective Areas of Work

The existing 6 pillars of MJM support - Strategic Consulting & Directions, Talent & Leadership Development, Governance & Board, Funding, Go to Market Connections and Research & Thought Leadership – are subsumed within the collective areas described above.

Vertical Domains – Emerging with Time

Construction
Infrastructure
Telecommunication
Tourism
Logistics
Manufacturing
Agriculture
Health

Enterprise Building

- Microenterprise
- People Owned Institutions

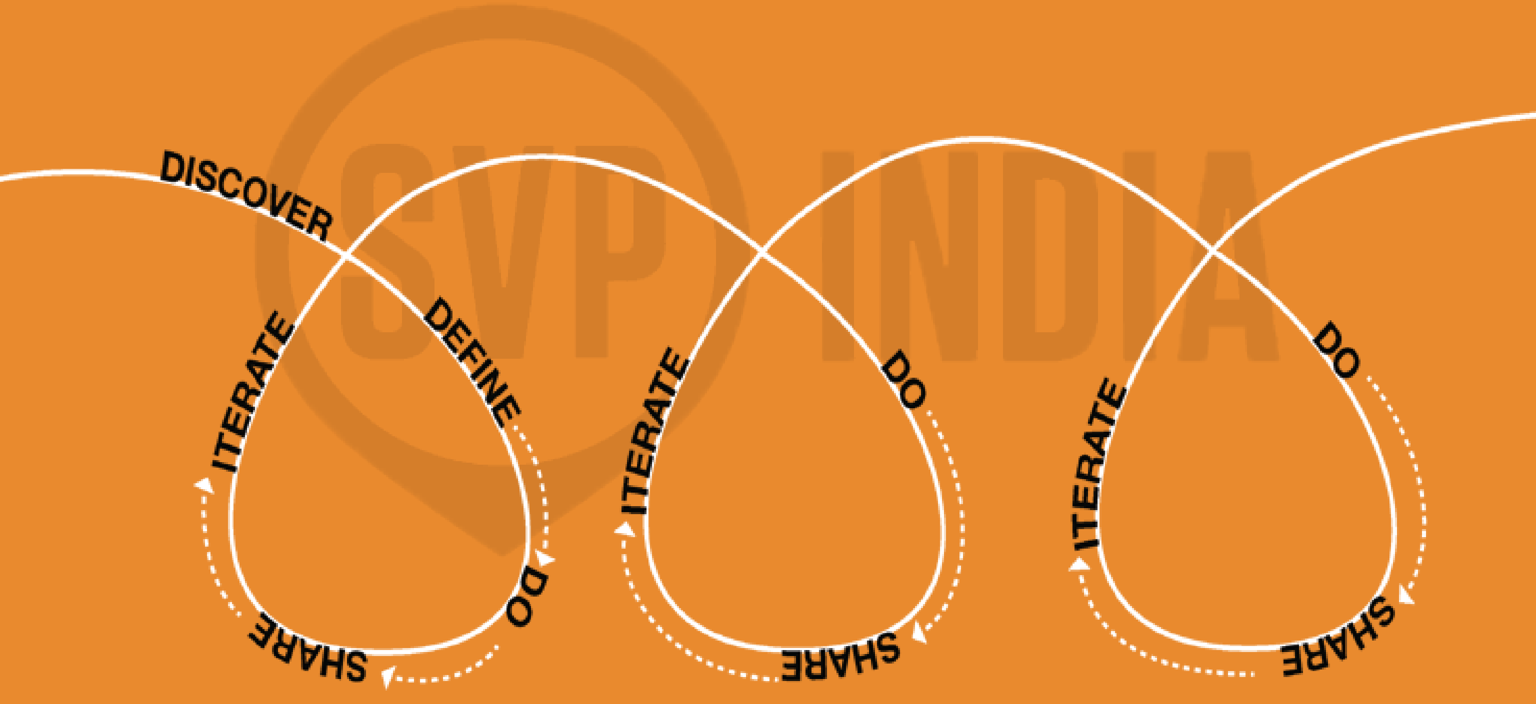
Skilling

- Trade Skills
- Foundational Skills

Collective Areas of Work

The process of delivering on the collective needs will follow the guiding principles of Unfold, Self-determine and Iterate. It will therefore be iterative and cyclical.

It involves the five key stages of Discover, Define, Do, Share and Iterate which gain momentum when practiced over a period of time. These stages are designed to fulfill the collective needs with the SVP Partners.


DISCOVER
DEFINE
DO
SHARE
ITERATE
DO
SHARE
ITERATE
DO
SHARE
ITERATE

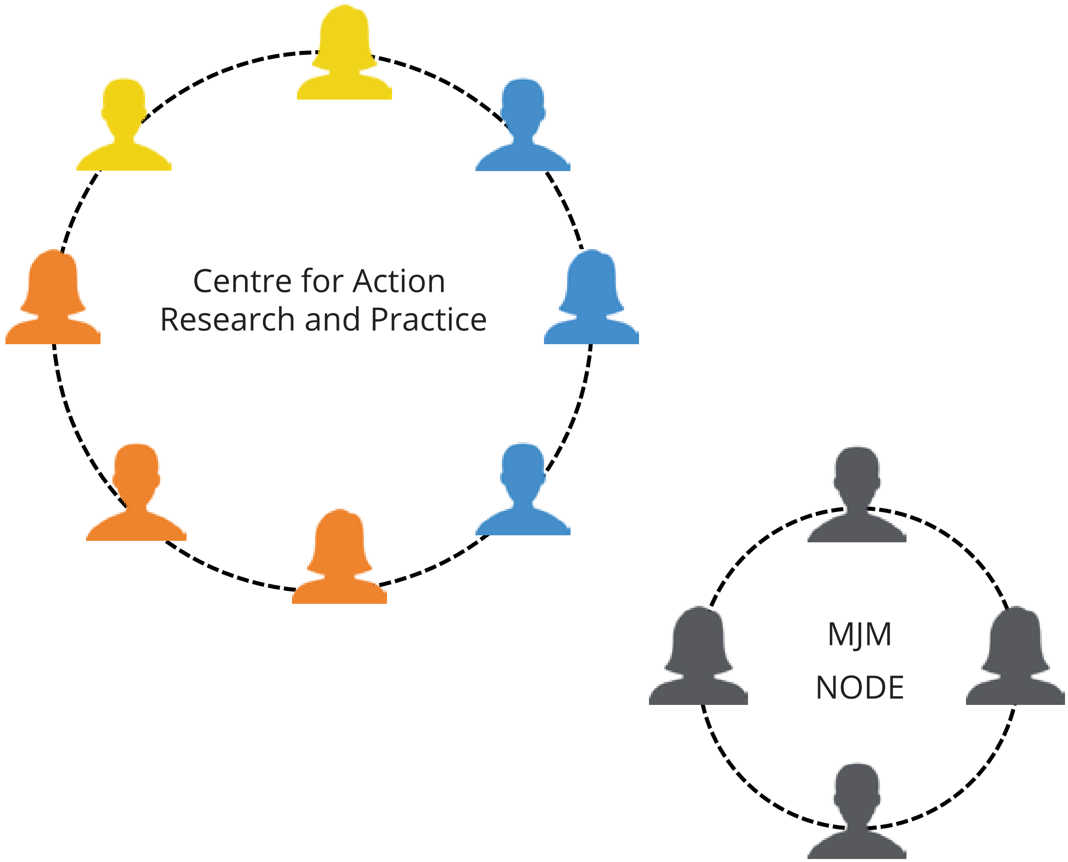
Organizing Ourselves

What does it entail?

Formalising the different Centres for Action Research and Practice (CARPE)
Identify the CARPE that SVP can contribute in. An SVP CARPE is identified based on collective needs of DPs. For instance, if HR is an area which most DPs need support in, it emerges as a CARPE.
Form a CARPE led by a SVP Partner and consisting of – Internal or External Experts, MJM Node member/GM. Each CARPE will be focused on a function such as HR, Marketing, Technology, Finance. We will use the functioning of HR CARPE as a way of illustration in this manual.

How do we do it?

MJM collects and collates the Action Plan #1 from all DPs in the cohort. Action Plan #1 has the list of needs that the DP and SVP have prioritized. Some of these needs will be met in the individual DP-LP (spiral) track while some needs maybe felt by multiple DPs and need to be addressed collectively.
MJM Node requests Partners to lead the different CARPEs depending on their expertise, interest and time availability. For each CARPE, MJM appoints CARPE Lead Partner and selects a MJM Node member. Together they identify and select internal/external experts for the CARPE.


Centre for Action
Research and Practice
MJM
NODE

Discover

What does it entail?

• The HR CARPE develops a deeper understanding of the HR needs of individual DPs that have prioritized HR as their need.

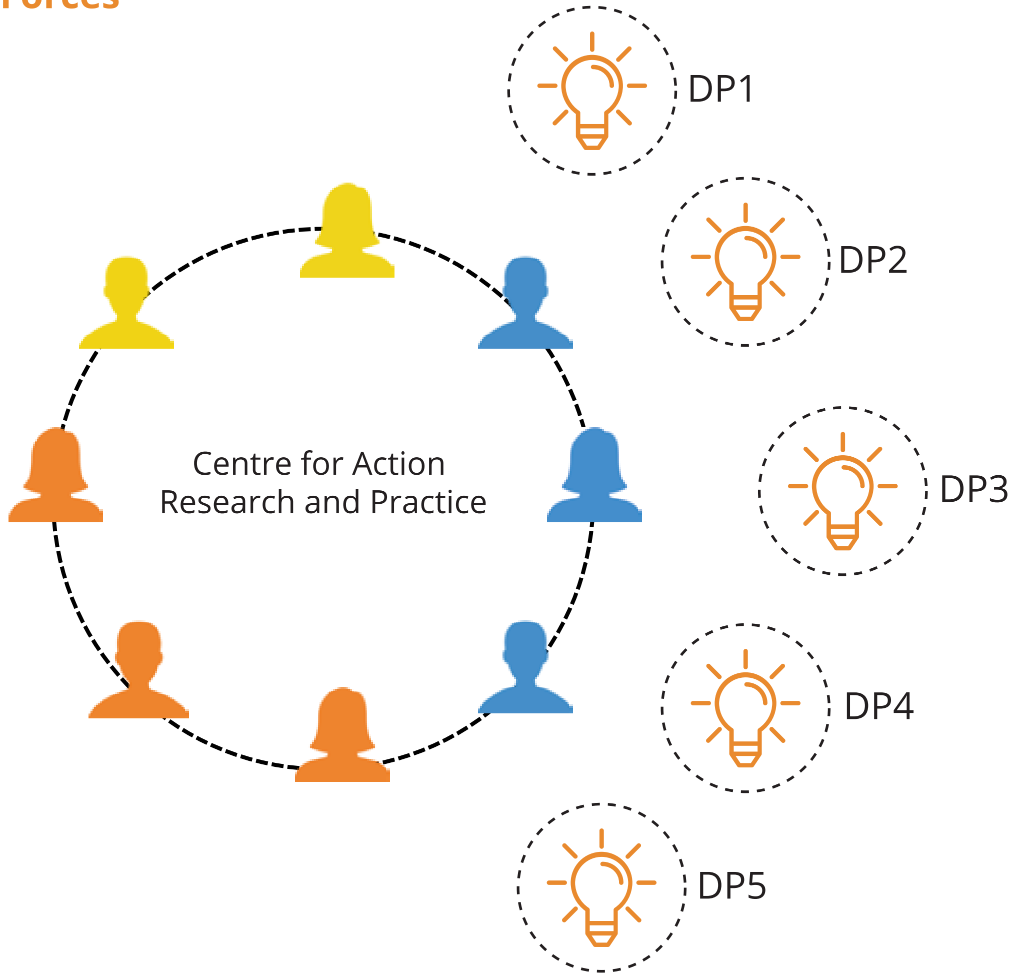
• This CARPE consolidates and analyzes the HR needs to look for patterns and throughlines for the group. This understanding feeds into a HR workshop as the next step.

How do we do it?

• MJM member of the CARPE emails/calls/meets the DP Task Force to get a detailed brief on the HR need.

• The MJM team member documents the calls with different DP Task Forces, analyzes and consolidates the data and shares with the CARPE Lead Partner. Together they develop the patterns and throughlines across the DPs to feed into the design of an HR workshop.

DP Task Forces



Define

What does it entail?

Designing and Conducting an HR workshop to address the patterns and throughlines in HR needs across DPs. This could also serve to identify the capability building needs of the various organizations.

• Designing and organizing a HR Definition Workshop for a group of DP Task Forces.

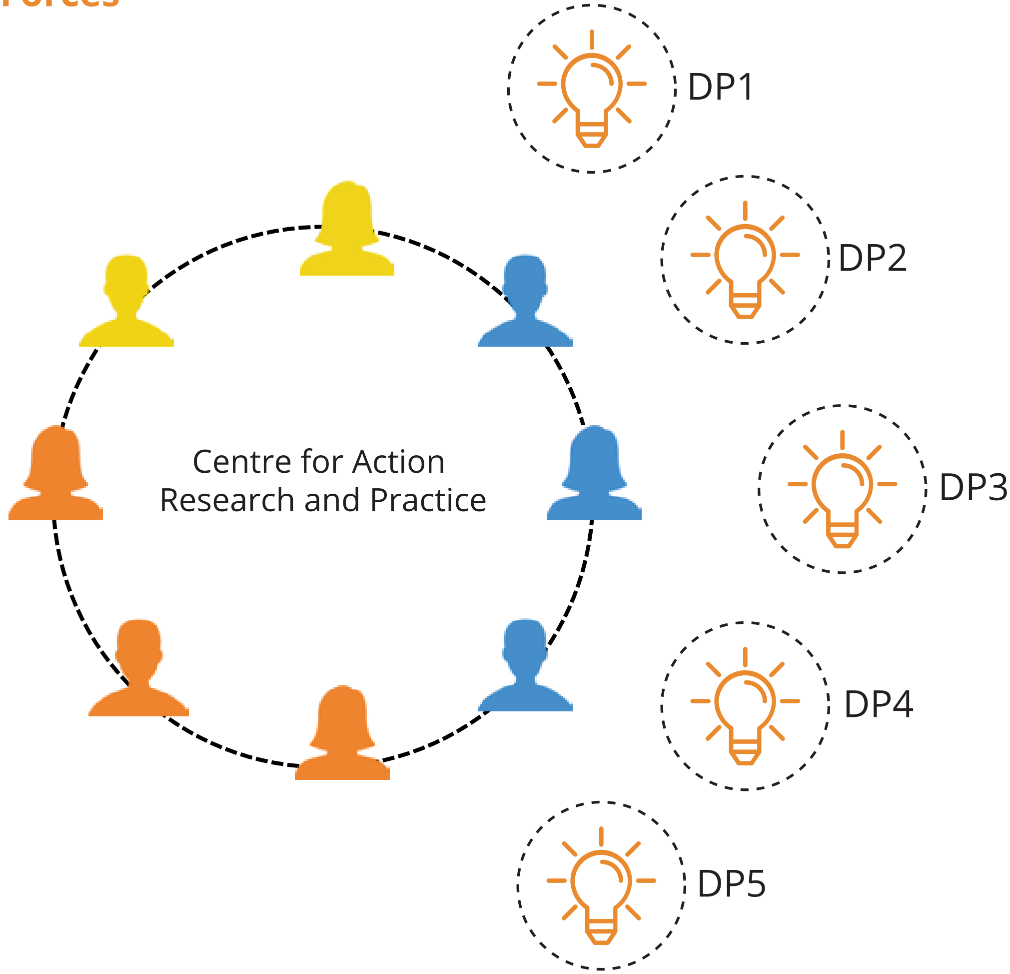
• Conducting the HR Definition Workshop with all the DP Task Forces who have sought support in HR. This workshop and its follow up will lead to an HR Action Plan for the year.

How do we do it?

• CARPE (bringing in the internal/external HR expert) meets to prepare design and agenda of the workshop.

• CARPE conducts a one day workshop with all DP Task Forces seeking HR support. They also follow up with the DP Task Forces to develop HR Action Plan.

DP Task Forces



Do

What does it entail?

Delivering on the HR (Annual) Action Plan

• Working with internal/external experts to design and deliver the HR understanding (models, frameworks, best practices) to the group of DPs seeking HR support. This is done in a workshop setting. The DPs then apply the understanding to their individual orgs. There can be a series of workshops depending on the needs.

• Subsequent to generic, collective fulfillment of needs, some will spin off into individual tracks with experts and individual DP-LP working together.

• Preparing a HR Delivery Report at the end of every quarter that details the status of deliverables against objectives from the HR (Annual) Action Plan.

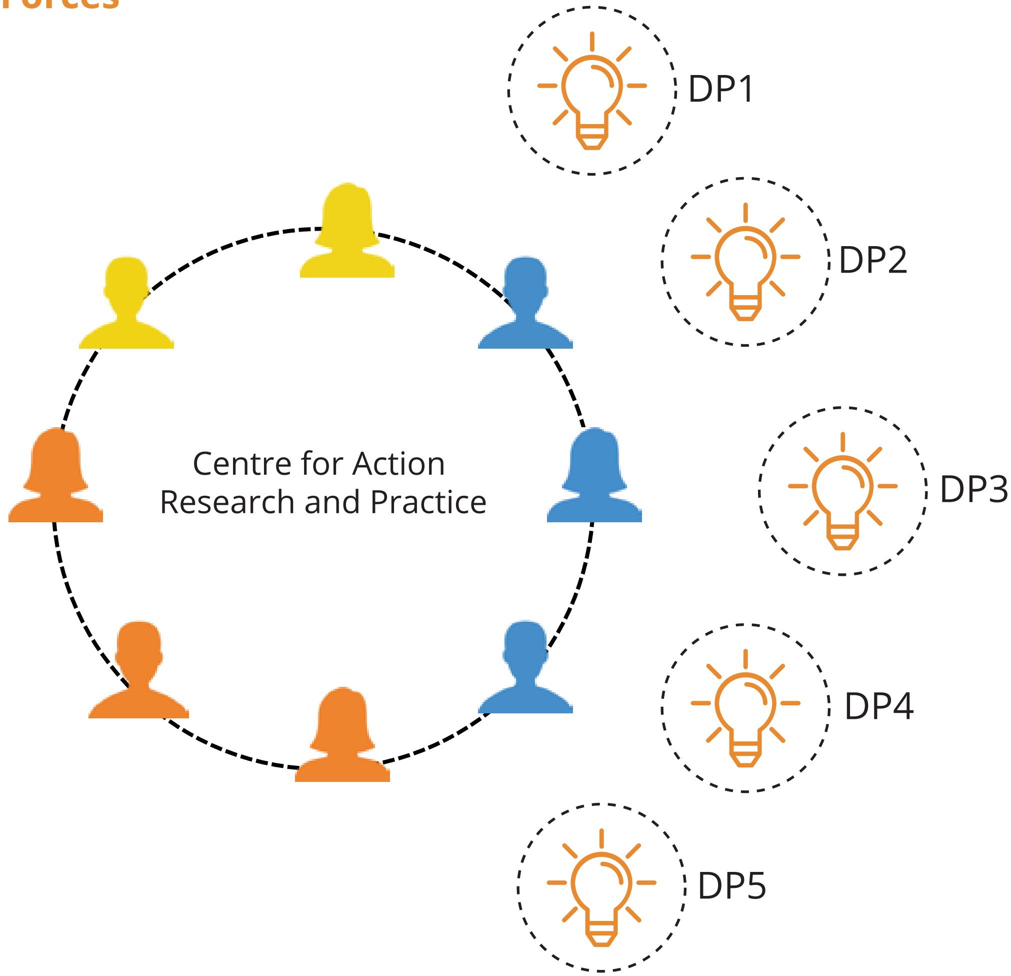
How do we do it?

• Identify HR experts matching the needs identified in the HR Action Plan. Brief and select the right expert to deliver. The expert scopes, leads and delivers the generic HR workshop series. It also involves follow up by the MJM Node in between the workshops.

• The individual tracks that emerge from the series of workshops could be led by the existing experts or by bringing in other experts for specific deliverables.

• The first draft of the HR Delivery Report is prepared by the MJM Node member of the HR CARPE. This is presented to the entire CARPE and their feedback is incorporated.

DP Task Forces



Share

What does it entail?

Sharing the areas of work in HR completed by the HR CARPE. It involves monthly conference calls or meets between the org LPs and CARPE LPs with specific themes for the meetings. For instance HR, Marketing and Technology can be clubbed as the theme for one specific monthly meeting. The meeting will enable cross learning and understanding the challenges, the resources required and the way forward.

How do we do it?

- MJM Node to coordinate the conference call/meet with a particular theme and agenda.
- The HR CARPE LP leads the discussion on the areas of work completed by the HR CARPE, the achievements, challenges, learnings and the next steps.
- MJM Node to document the next steps from the call and follow up on the same.


HR Centre for Action
Research and Practice
Marketing Centre for
Action Research and Practice
Technology Centre for
Action Research and Practice
MJM
NODE

Iterate

What does it entail?

Reviewing and Refining for the next year's HR Action Plan. This serves as a way to Pause, Reflect and Rethink the way ahead.

• Consolidating all the HR requirements based on review of the past year and incorporation of new HR requirements. It may mean continuing work on existing requirements, adding new requirements from the DPs already in the HR domain or requirements of new DPs coming into the HR domain.

• The HR CARPE develops a deeper understanding of the HR needs of all the DPs that have HR needs.

• Reviewing and Refining for the next year's HR Action Plan. This serves as a way to Pause, Reflect and Rethink the way ahead.

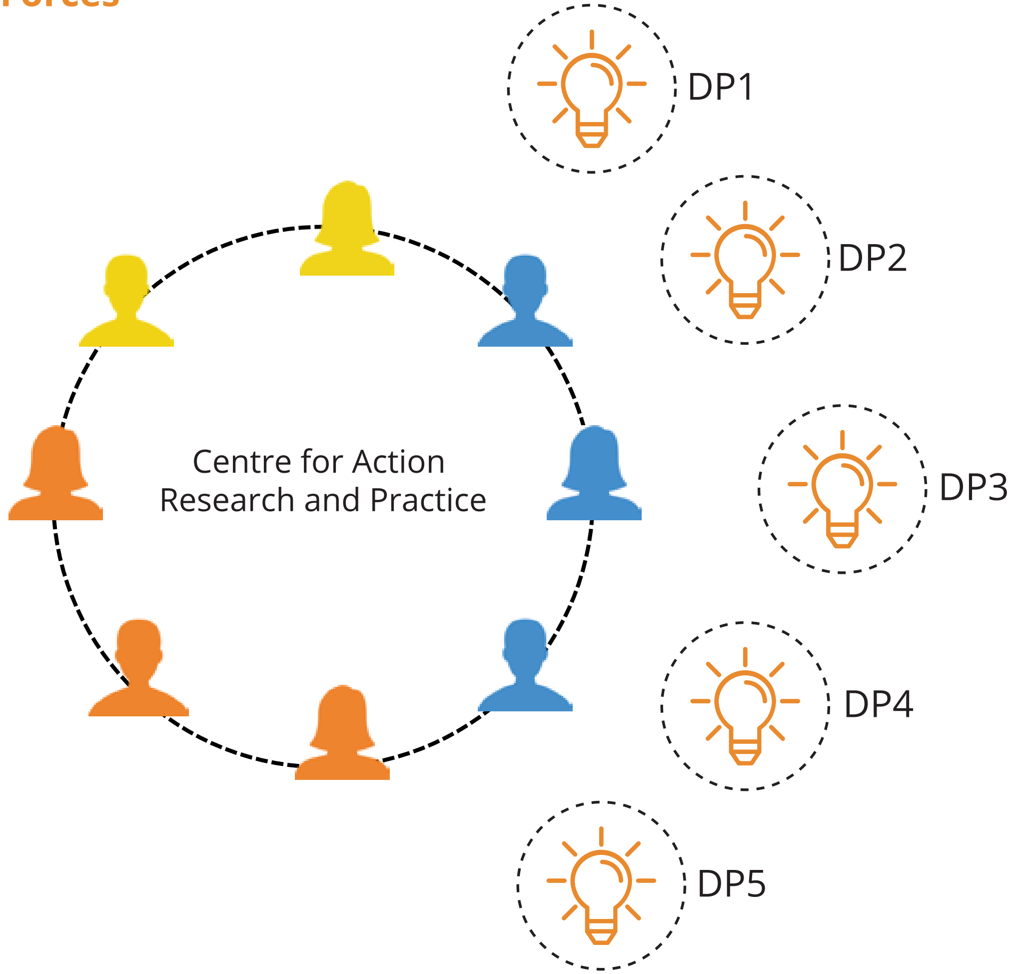
How do we do it?

• HR CARPE meets for a day long process to map out the status on agreed upon deliverables, movement from baseline and key challenges and learnings. It feeds this reflection to identify further needs.

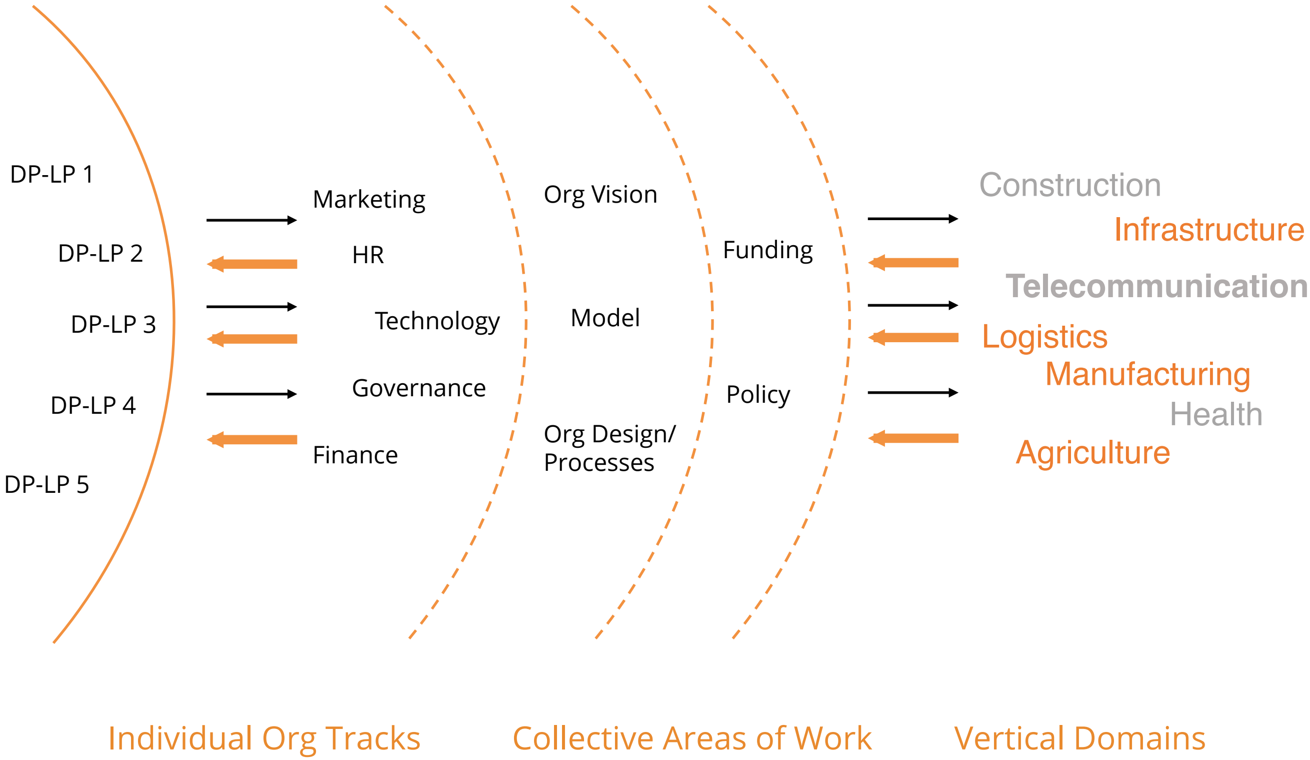
• MJM member of the CARPE emails/calls/meets the DP Task Force to get a consolidated list of detailed brief on the HR need.

• HR CARPE meets to develop the Action Plan for the next year.

DP Task Forces



Coming Together



Annexure

List of Tools			
Phase	**Step**	**Tools**	**Map Reference**
Discover	1.Study	1.STUDY TEMPLATE	Study
	2.Adapt	2.DISCUSSION GUIDE TEMPLATE	Discussion Guide
	3.Schedule	3.SCHEDULE EMAIL TEMPLATE	Schedule Email
	4.Meet	4a.AUDIO/VIDEO RECORDING	AV Recording
		4b.DISCOVER MEETING MINUTES TEMPLATE	Meeting Minutes
	5.Share	5.INSIGHT TEMPLATE	Insight Document
Define	6.Form	6a.TASK FORCE FORMATION TEMPLATE	Task Force Formation
		6b.TASK FORCE EMAIL TEMPLATE	Task Force Email
	7. Decide	7.ACTION PLAN #1 TEMPLATE	Action Plan #1
Do	8.Internal Collect	8a. INTERNAL COLLECT_EMAIL SURVEY TEMPLATE	Email Survey
		8b. INTERNAL COLLECT_TELEPHONIC TEMPLATE (T1)	Phone Call
		8c. INTERNAL PARTNER DATABASE TEMPLATE	Partner Database
	9.Internal Call	9a. INTERNAL CALL_TICKET EMAIL TEMPLATE	Email Ticket
		9b. INTERNAL CALL_TICKET WHATSAPP TEMPLATE	Whatsapp Ticket
		9c. INTERNAL CALL_TELEPHONIC TEMPLATE (T2)	Phone Call
	10.Internal Match	10a.INTERNAL MATCH_SHORTLIST TEMPLATE	Shortlist
		10b.INTERNAL MATCH_TELEPHONIC TEMPLATE (T3)	Phone Call
		10c.INTERNAL MATCH_SELECTION TEMPLATE	Selection Document

Do	11.External Collect	11a.EXTERNAL COLLECT_TELEPHONIC TEMPLATE (T1)	Phone Call
		11b.EXERNAL CONSORTIUM DATABASE TEMPLATE	Consortium Database
	12.External Call	12a.EXTERNAL CALL_EMAIL TEMPLATE	Email
		12b.EXTERNAL CALL TELEPHONIC TEMPLATE (T2)	Phone Call
	13.External Match	13a. EXTERNAL MATCH_SHORTLIST TEMPLATE	Shortlist
		13b. EXTERNAL MATCH_TELEPHONIC TEMPLATE (T3)	Phone Call
		13c. EXTERNAL MATCH_MEETING MINUTES TEMPLATE	Meeting Minutes
		13d. EXTERNAL MATCH_SELECTION TEMPLATE	Selection Template
	14.Deliver	14a. FINAL SCOPE TEMPLATE	Final Scope
		14b. DELIVERY REPORT TEMPLATE	Delivery Report
Share	15.Share	15a.SHARE_ EMAIL TEMPLATE	Email
		15b. SHARE_CONFERENCE CALL TEMPLATE	Conference Call
Iterate	16.Review	16. REVIEW TEMPLATE	Review Document
	17.Refine	17. ACTION PLAN #2 TEMPLATE	Action Plan #2