# **TOR for Induction and Visioning Workshop**

# *<insert NS name and CVAP programme/year>*

Summary

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| **Purpose**: To officially launch the NS CVAP programme, as well as discuss and agree the premise for a CVA vision that will steer the direction of the CVAP activities in the next 3-4 years. Validate what CVA operational readiness level the NS are at currently and agree what level they can be by end of CVAP. Provide an early opportunity for leadership buy-in and ownership of the CVAP programme.  **Workshop facilitators:** CVA Focal Point and/or CVA Preparedness Delegate + management representative (e.g. Programmes). Option to have an external co-facilitator.  **Example timeframe**: 1 day |

# Background

Since X *<insert date>,* the *<insert NS name>* has been engaged in CVA, often implementing programmes with other Movement actors such as IFRC and ICRC and to a lesser extent with the UN or independently.

In *<date>* the NS identified the need to increase its capacity to be operationally ready to deliver cash efficiently and timely and *<IFRC or PNS name>* agreed to support the NS. The RCRC approach to CVA preparedness (CVAP) was the agreed model to be adopted.

In order to start the CVAP activities, an Induction and Visioning Workshop followed by a Planning Workshop needs to be held. The Induction and Visioning workshop leads the path for agreeing the NS CVA strategic and operational outcomes (CVA vision statement and CVA operational readiness levels), including the important step of gaining leadership ownership of the CVAP process. The Planning workshop looks at CVA organisational capacity and gaps (CVA self-capacity assessment) and provides the detailed planning for CVAP (CVAP Plan of Action).

The two workshops can be held either back-to-back over consecutive days or as standalone workshops on separate occasions.

# Purpose of the workshop

The main purpose of the Induction and Visioning Workshop is to officially launch the NS CVAP programme, as well as brainstorm and develop the basis for a CVA vision that will steer the direction of CVAP activities in the next 3-4 years. The workshop also includes an opportunity to understand and verify what Movement CVA operational readiness level the NS is at currently and agree the CVA operational readiness level the NS can expect to achieve by the end of CVAP, as well as into the future.

The workshop is also key to ensure all key staff understand what CVAP is, to learn about the Movement’s current commitment for use of CVA, as well as external CVA trends.

# Objectives

To specific objectives of the workshop are:

* Officially launch the NS CVAP programme
* Understand the Movement approach to CVA and its role as a global CVA player
* Understand latest CVA progress in the external environment and context – main trends, actors, challenges and coordination for CVA
* Refresh on the NS strategy (focused on NSD and PER), to ensure CVAP can integrate into the NS operational plans
* Ensure key staff are aware of the importance of CVAP and provide an opportunity for leadership to gain buy-in and ownership of the CVAP programme, at the start
* Validate the current Movement CVA operational readiness levels for the NS in terms of CVA ablility, likelihood, timeliness, accountability and expenditure and overall NS CVA operational readiness level at baseline
* Agree what CVA operational readiness level the NS can achieve by the end of CVAP (endline) and in the future
* Conduct a brainstorm discussion to inform a CVA vision statement for the next 3-4 years

# Methodology, scope and approach

A: Introductory sessions: CVA Awareness and NS strategy, with a focus on NSD/PER

The workshop will kick-off with a presentation on CVA awareness and an overview of CVAP. The presentation *(CVA Awareness presentation)* will include a basic overview of CVA, the global Movement approach to CVA including IFRC and ICRC, current trends in CVA and the external environment, as well as an overview of the CVAP process. Depending on the NS previous experience in CVA and/or the context, the presentation can be adapted or specific components expanded. For example, in a country with a high usage of digital technology for CVA or a growing trend of linking CVA to government social protection, these sections could be expanded.

During the introductory sessions, the NS can also briefly present its current NS strategy, with a focus on NSD/PER, to ensure CVAP integrates into the broader NS operational plans.

B: Visioning and agreeing NS CVA operational readiness levels

The main part of the workshop is dedicated to discussing and brainstorming the key parameters and scope for a CVA vision statement, as well as opportunity to agree and validate the NS CVA operational readiness levels for the NS currently and in the future.

Writing a CVA vision statement at the outset of CVAP is key to ensure that a fully owned CVA vision underpins the planning and encourages the NS to create a realistic, operational and strategic ambition, linked to both the NS strategy and the broader Movement vision for CVA.

The Movement CVA operational readiness indicators provide a way to measure the level of CVA ambition in the NS and capture what the NS is delivering in terms of CVA implementation. The five indicators include measurements for CVA ablility, likelihood, timeliness, accountability and scale. Data for the indicators is gathered from the last annual RCRC Counting Cash exercise or via the NS independently. See [*Guidance on how to collect the Movement CVA Counting Cash or Operational Readiness Indicators*](https://cash-hub.org/wp-content/uploads/sites/3/2023/11/xxx-4.-Tool-Guidance-for-Movement-Operational-Indicators-v18.pdf).

The first part of visioning looks at the Movement CVA operational readiness levels the NS will seek to achieve, to help operationally drive the intended vision, based on the achievable reality:

* What Movement CVA operational readiness level is the NS at currently? (baseline)
* What Movement CVA operational readiness level can the NS expect to be a) by the end of CVAP? (endline) and b) in 5 to 7 years?

Following this, the discussion will then focus on developing a CVA vision.

Having a CVA vision statement in place is important to ensure the NS has a common strategic intent for how, and why, it wants to scale up CVA. The CVA vision statement will provide the NS with an anchor and rationale to support its ambition to progress up through the CVA operational readiness levels. The vision should be positioned in line with the Movement’s current ambition for CVA, as well as external CVA trends, as presented in the earlier CVA Awareness session. The CVA vision should also seek to link with the existing NS Strategy (or propose a revision, if necessary). Consideration will also be given to the NS’ current role as auxiliary to government and how this could look in terms of CVA in the future.

After agreeing both the current and prospective CVA operational readiness levels for the NS, a discussion will take place to agree the parameters for a CVA vision, considering:

* How the NS wants to position itself in relation to the Movement ambition for scaled-up CVA (50% by 2025). Any issues or blockages in the way.
* Strategic use of CVA modality (e.g. multi-purpose cash, conditional cash or both)
* Key areas to be developed or invested in (e.g. investment in IM, linking CVA to social protection)
* Agreement of commonly held values and strategic priorities that can support the CVA vision

The discussion will consider a range of key cross cutting strategic themes, including use of multipurpose cash, sectoral cash, use of IM, digital CVA, social protection and collaboration/partnerships, including the role of NS as auxiliary to government.

A [*CVA vision statement*](https://cash-hub.org/wp-content/uploads/sites/3/2024/02/1.1.d-CVA-vision-statement-.docx) will convert key takeaways from the discussion into a simple, tangible agreement and commitment that the NS can refer to throughout CVAP, as a reminder of its collective ambition for the use of CVA. This will be completed in the final session by a small task force (3-4 people), including at least the CVA Focal Point and/or CVA Preparedness Delegate and one representative from leadership.

# Participants

Participation for the Induction and Visioning workshop should be focused on management, including leadership. To encourage future ownership and buy-in to the CVAP programme, it is essential that leadership participate in this workshop. This is particularly critical for the CVA visioning discussion, which form the basis for the NS strategic way forward and NS operational ambition for the next three to four years regarding use of CVA.

It is suggested that attendance includes Secretary General and/or Under Secretary General, Chairman and/one other Board member, as well as managers of each department, including Programmes, Operations, Logistics and Finance. Branch attendance is not mandatory, as the focus is on ensuring leadership engagement, but the breadth of participants decided based on NS need and context. However, it is strongly encouraged the NS prioritise relevance over mass participation, in order for the visioning session discussion to be achievable in a workshop format. Fewer people should attend the Induction and Visioning workshop than the Planning workshop.

The CVA Focal Point (if already in place) with the CVA Preparedness Delegate, will co-facilitate the workshop together with a management representative (e.g. Programmes).

**Example agenda**

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| **Day 1** |  |
| 9:00 - 9:30 | **Welcome and introduction to workshop** |
| 9:30 - 10:45 | **CVA awareness** |
| 10.45 – 11.30 | **Presentation of NS strategy** |
| 11.30 – 12.00 | Tea/Coffee Break |
| 12- 00 - 12.15 | **Presentation and validation of current Movement CVA operational readiness levels (baseline)** |
| 12.15 – 13.00 | **Agree Movement CVA operational readiness levels to reach by end of CVAP (endline)** |
| 13.00 – 14.00 | Lunch Break |
| 14.00 – 16.00 | **Discussion to establish a CVA vision** |
| 16.00– 16.15 | Tea/Coffee Break |
| 16.15 – 17.30 | **Develop CVA vision statement** |