# CVAP Planning Workshop

**FACILITATORS’ GUIDE**

# Preparation activities

* Share and invite feedback within NS on ToR
* Gather summary of relevant information from the Induction and Visioning Workshop to present (NS CVA vision statement, baseline and projected Movement CVA operational readiness levels)
* Confirm participants. Approx. 10-15 participants are ideal. It is critical all relevant individuals are in the room.
* Identify venue
* Organise workshop materials

DAY 1

**Morning**

**8.30– 9.30 Welcome, Introduction to workshop**

**In Brief** - This session introduces the background to the workshop. It begins with providing a basic overview of the rational for having a Planning Workshop, the key objectives and format, plus ways of working. Any suggestions or changes to the scheduling for the next days can also be mentioned here.

**Outcomes:** Clarity on objectives of planning workshop

**Process:**

* Introductions: facilitators introduce ourselves and respective roles.
* If relevant, everyone introduces themselves – one thing about themselves, and one thing about their experience using CVA. This step can be skipped when everyone knows each other
* Introduce (10 mins): Explain main purpose of workshop. Previous induction workshop on visioning with senior management was more strategic and set the NS ambition. This follow-up will go further into CVA capacity analysis and planning; CVA capacity self-assessment and Plan of Action (PoA).
* Go through the agenda.
* Emphasise timekeeping
* Agreeing expectations and ways of working (10 mins). Ask everyone what they want to get out of the workshop.

**Handouts:** Agenda

**9.30 – 10.15 Review of NS CVA vision and Movement CVA operational readiness level to achieve**

**In Brief** - This session will recap on the findings from the visioning session in the Induction/Visioning Workshop, as participants are likely to be different between the workshops. There may also be external stakeholders present who are interested to know about the NS planned approach for CVA. The session will present:

a) an overview of the NS CVA vision including any current blockages and gaps to achieve these goals

b) an overview of the baseline Movement CVA operational readiness levels being achieved ability, likelihood, timeliness, accountability and scale) gathered either from Counting Cash or 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)

c) what projected Movement CVA operational readiness levels the NS will aim to achieve in the next 3-4 years by the end of CVAP and beyond.

**Outcomes:** Understand and discuss the leadership NS vision for CVA to be achieved under CVAP. A summary of the NS CVA operational readiness levels – current and projected.

**Process:**

* Presentation by CVA Focal Point/Programmes/external facilitator of the decision taken by leadership for NS CVA vision and future CVA operational readiness level (30 mins)
* Q&A, Plenary session (15 mins)

**Handouts:** NS CVA vision statement; Latest data from RCRC Counting Cash (or the NS independently) showing baseline CVA operational readiness levels, and projected CVA operational levels

**COFFEE BREAK**

**10.45 – 12.30 NS CVA journey to date and lessons learned**

**In Brief** - This session provides a summary overview of all NS CVA programmes to date, against the insititional and policy context. It should specifically focus on the lessons learned aspects and any remaining areas for improvement.

**Outcomes:** Summary of NS CVA programmes: successes, challenges and lessons learned that have informed the NS CVA journey to date.

**Process:**

* Presentation by key staff on the CVA journey to date (30 mins)
* Plenary discussion, feedback, any questions (15 mins)

Afternoon

The CVA Capacity self-assessment session will take place over the whole afternoon of Day 2. Suggested format for the sessions is outlined below, but timings/breaks can be set to suit.

**13.30 – 15.30 CVA Capacity Self-Assessment**

**In Brief** - This session is dedicated to conducting the CVA capacity self-assessment. The tool is divided into five sections reflecting the five areas of the CVAP framework. The scores, evidence and proposed activities are collected through group work, then presented back to the whole workshop to seek consensus and collective agreement. In some cases, the NS may have an external partner who is supporting CVAP support with facilitation for this this session.

Immediately before the workshop, the faciliator should meet with the CVA Focal Point for a debrief on any pre-step work around initial scoring and evidence gathered to support facilitation during the workshop.

**Outcomes:** Provide a detailed picture of the NS CVA organisational preparedness capacity (scores to be given per CVAP area and one overall score) and provide evidence for where the NS needs to improve its CVA capacity in order to reach its target CVA operational readiness level and vision.Agree a priority list of actions that will be developed into a Plan of Action.

Completed [*CVA Capacity Self-Assessment tool*](https://cash-hub.org/wp-content/uploads/sites/3/2024/03/CVA-Capacity-Self-Assessment-tool-and-instructions.xlsx)

**Process:**

See ‘Instructions’ tab in *CVA Capacity Self-Assessment tool and instructions* for an overview of the process that should take place in the workshop.

Participants are divided into four groups, with CVAP area to be covered by each group and one group taking two areas. The session is structured as follows:

* Each group divides up the domains per area between them and participants individually go through their designated domains, suggesting scores for each (based on 1-3+) and providing evidence as justification. Actions are also suggested to address the gaps.
* Individuals feedback their results to the group and proposed scoring and evidence is discussed collectively. Following debate, the group reaches a joint decision and consensus level per domain.
* Each group then presents their conclusion to the main workshop for final buy-in and consensus, amongst the broader participants.

The following is needed for the exercise to be effective:

* Facilitators should be assigned per group and are responsible for inputting answers into Excel, including the final scoring, evidence and consensus.
* Each group should consist of people who know the content of each Area
* The role of the CVA Focal Point in the workshop is key. If they have invested in the pre-step, they will be in a good position to challenge answers where necessary, along with the main facilitator, if evidence is lacking or poorly applied, and where participants may be over-estimating scoring.

**COFFEE BREAK**

**15.45 - 17.30 CVA Capacity Self-Assessment (cont’d)**

**In Brief** - The final session should be to collectively agree the overall score/s of the CVA capacity self-assessment and to prioritise and short list the activities that can be taken forward into the Plan of Action. Only the critical domains that relate to the CVA vision and that can be tangibly achieved in the next 3 years should be chosen.

**Outcomes:** List of priority domains/activities from the CVA capacity self-assessment.

**Process:**

* Each group should prioritise activities according to High/Medium/Low. Once the High list has been agreed, these should become the priority activities. If there are still too many, cut them back further into Highest priority
* Special attention should be put on who should lead each of the final priority activities as well as the associated persons, the ideal timeframe and sequencing of activities.

**DAY 2**

**Morning**

The Plan of Action (PoA) session will take place over all of Day 2. Suggested format for the sessions is outlined below, but timings/breaks can be set to suit.

**9.00-11.00 – Plan of Action**

**In Brief** – The Plan of Action (PoA) is built from the priority activities identified during the CVA capacity self-assessment. For developing the PoA, participants will be split into five groups (one per CVAP area) and focus on detailing the priority actions in terms of resources required and timeframe, in addition to any other considerations.

**Outcomes:** Completed PoA tool

**Process:**

See ‘Instructions’ tab in [*CVAP PoA template, budget, timeframe and instructions*](https://cash-hub.org/wp-content/uploads/sites/3/2024/02/1.4.a-CVAP-PoA-template.xlsx) for an overview of the process that should take place in the workshop.

**Activity 1. Setting the goal and outcomes**

First, the group as a whole first needs to set an overall goal for the CVAP PoA. This should be linked to the CVA vision and operational level for where the NS want to be at the end of the CVAP programme, as defined in the visioning workshop.

**Activity 2.** **Developing the PoA**

The PoA is built from the activities participants have identified as key to improve capacity in the CVA capacity assessment exercise. For developing the PoA, participants split into four groups each group takes one area/outcome and one group takes both area 3 and 5. Each group should then look at the activities suggested during the CVA capacity assessment exercise and prioritise the key ones and add any other activity the group might consider important. Once the key activities have been agreed, each group will focus on ***who*** is responsible (or ***where*** the responsibility lies, which department) who else needs to be **engaged** and the ***timeframe***, in addition to any other considerations, such as ***PNS*** involved.

It is helpful to always keep in mind the CVAP level the NS is trying to achieve when detailing activities.

**Activity 3: Prioritising, finalising and sequencing the PoA**

Following activity planning, the proposed PoA is then agreed with the broader participants.

- Once the activity planning has been developed, groups then feedback to the main workshop for collective agreement and buy-in.

- The overall PoA should then be looked through, to see if activities sequence well with each other and to check if the timing of activities fits adequately with the broader NS plans and commitments.

Note that **Budgeting the PoA** will only take place once the PoA has been presented to the leadership and outside of this workshop.

**COFFEE BREAK**

**11.30-13.00 – Plan of Action (cont’d)**

**Afternoon**

**14.00 – 15.30 Plan of Action (cont’d)**

**COFFEE BREAK**

**15.45 – 17.30 Prepare findings and presentation for leadership approval** (N.B CVA Focal Point and Programmes/Operations only, or others as required)

**DAY 3**

**Morning only**

**09.00 – 09.30 Presentation of the CVA Self-Capacity Assessment results**

**In Brief** – The resuls of the CVA self-capacity assessment will be presented to leadership, so they can understand what the current capacites and gaps are for the NS and what CVA organisational preparedness capacity they are currently at. Ranking of priority actions will also be shared.

**Outcomes:** Leadership understanding of the NS CVA organisational preparedness capacities and gaps, including current scores.

**Process:**

* PowerPoint presentation to leadership, by CVA Focal Point or Programmes (15 mins)
* Feedback, questions, clarifications, and approval (15 mins)

**09.30 – 10.30 Presentation of the Plan of Action**

**In Brief** – The draft PoA will be presented to leadership, so they can understand what is being proposed, ask for clarifications, make suggestions and approve the draft. After the planning workshop, the CVA Focal Point will need to finalise the PoA, including the budget, and share with relevant staff in the NS for final approval.

**Outcomes:** Approved draft Plan of Action by leadership.

**Process:**

* PowerPoint presentation to leadership, by CVA Focal Point or Programmes (45 mins)
* Feedback, questions, clarifications, and approval (30 mins)

**10.30 – 10.45 Close and Wrap up; Final remarks**

**Reporting on the workshop**

The lead facilitator is responsible for the completion and sharing of the written reports with the relevant people. The recommended template for the workshop report is *Internal baseline for organisational capacity – Report template Visioning and Planning workshop* which should be complemented by [*1.3.d bis One pager overview Visioning and Planning workshop.*](https://cash-hub.org/wp-content/uploads/sites/3/2024/02/1.3.d-bis-Internal-baselineTwo-Pager-Overview-Visioning-and-Planning-workshop_example.pptx)