# CVA SOPs workshop

**FACILITATORS’ GUIDE**

This faciliators guide is also accompanied by a Powerpoint presentation covering the 2-day workshop.

Preparing for the workshop

This workshop requires a substantial amount of preparation from the CVA Focal Point. If there are no SOPs in place, the CVA Focal Point should aim to have interviews with heads of departments in advance, to gain an understanding of the key existing processes. These should be brought along to the workshop to inform the SOPs development. The [CVAP SOPs template](https://cash-hub.org/wp-content/uploads/sites/3/2024/03/2.1.e-CVA-SOP-template-1.docx) can be used to structure this information.

The NS will need to decide in advance whether they will start to develop the tools as part of the SOPs workshop or keep this for a separate workshop. If a session on tools is to be included, the CVA Focal Point will need to gather and map the existing tools in advance of the workshop and bring it along. The mapping will be required for the session to inform what tools need to be adapted or developed. There will still need to be a follow-up workshop specifically on tools to develop these. If a session on tools is not included in the SOPs workshop, the session can instead be dedicated to further work on the SOPs.

# Preparation activities

* Share and invite feedback within NS on ToR
* Confirm participants. Approx. 15 participants are ideal. It is particularly important to have people who have been most involved in the CVA programming across departments, including members of the Technical Working Group, Programmes, Logistics, PMER, HR, Finance etc
* Identify venue
* Adapt PowerPoint presentation
* Organise workshop materials

DAY 1

**Morning**

**8.30– 9.00 Welcome; Objectives of workshop**

**In Brief** - This session introduces the background to the workshop. It begins with providing a basic overview of the rational for having the SOPs workshop, the key objectives and agenda, 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 SOPs workshop**

**Process:**

* Introductions: facilitators introduce ourselves and respective roles.
* Everyone introduces themselves – one thing about themselves, and one thing about their experience using CVA
* Introduce (10 mins): Explain main purpose of workshop.
* 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/materials:** Agenda

**9.00 – 9.45 Introduction to CVA SOPs**

**In Brief** – This session provides an overview on what are SOPs and their function, what they should include, and the suggested format for SOPs. Different example NS SOPs can be provided to illustrate the discussion as well as the CVA SOPs template. Some NS may also have been using CVA guidelines rather than SOPs and the differences should be highlighted in the session.

**Outcomes: Understand what are SOPs, why they are important and what they should include. Understand how SOPs differ to CVA guidelines.**

**Process:**

* Presentation by CVA Focal Point (30 mins)
* Q&A, Plenary session (15 mins)

**COFFEE BREAK**

**10.15 – 11.00 CVA implementation process and decision requirements**

**In Brief** - This an initial group warm-up exercise work to start to map the main processes for starting a CVA response post-crisis and to discuss key CVA decision making requirements for the NS. Note the discussions in this session are just as important as the outcomes. There will be time later in the workshop to define and these points more specifically and in more detail.

**Outcomes: Discuss and agree what are the main processes in starting a CVA response post-crisis, in terms of assessment, response analysis and set-up, and where key NS decisions and approvals are needed.**

**Process:**

In two groups, participants to dicsuss the following questions: (20 mins)

* What are the main processes in a CVA response (post-crisis), in terms of assessment, and response analysis and set-up? (1st group) and implementation and monitoring (2nd group) [
* Where are key decisions and approvals needed?
  + List the key steps in starting up CVA operations at NHQ
  + Define which steps require a management decision?
  + What is the ideal timeframe for approval?
* Bonus/if time: After how many days following the start of a response can the NS implement CVA?

Plenary discussion to share results (10 mins)

**11.00 – 12.30 Review or design SOPs/key CVA steps in an emergency response**

**In Brief** - Interactive group work to collectively review either a) the current NS SOPs in order to make improvements and revisions or b) propose new SOPs steps, adapated from the CVAP SOPs template, for NS who do not currently have SOPs in place and who are designing SOPs for the first time. There are options to use Google Drive or post-its and paper for this session, and exercises can be adapted accordingly.

N.B. For the purpose of this workshop, SOPs development will exclude the pre-crisis preparedness work, which will have already been well defined as part of CVAP and will be included in preparedness and contingency plans rather than SOPs.

**Outcomes: Feedback captured on existing CVA SOPs and actions used to inform the following session on developing a new version NS SOPs for the CVAP programme.**

**Process:**

Brief presentation on what NS SOPs/guidelines already exist (if any), what they contain and discussion on what might be missing (15 mins)

Review of existing SOPs

Group work to review SOPs and processes for CVA implementation in an emergency response (1 hour). Google Drive can be set-up for this activity in advance and documents uploaded.

* For this and other group work exercises in the workshop groups will be provided with a computer.
* Instead of relying on traditional flip charts, post it notes and paper, groups can be working on a shared Google document, making note of feedback in a digital space. This will allow facilitators and participants to action the feedback when revising the SOPs, as well as to project the groupwork when it is presented back to the plenary by groups.
* One person in each group can be nominated to ensure feedback is recorded on the Google sheet.
* Source material to review for the exercise will either be existing NS SOPs or the CVA SOPs template.
* Arrange three groups: one per CVA project cycle phase (excluding CVAP): Assessment and Response Analysis; Set-Up and Implementation; M&E
* Allocate each group a symbol: blue stars, orange lightning, green smiles.
* Each group to review each CVA project phase on a rotational basis, putting comments on post-its in answer to the following questions:
  + What do you like/what is good?
  + Are there any gaps or incorrect information?
  + What recommendations would you make to improve it?
  + The symbols are important during the activity, as groups will use their symbols to show agreement on feedback left by previous groups.
  + Each group takes 20 mins per topic. Facilitators say when to change topics.

Groups to summarise highlights of their results in plenary (15 mins)

Where there are no SOPs in place and/or post-its and flip chart option (e.g poor internet connectivity):

* Split into same groups as above.
* Each group to write each step in the response (from assessment to final evaluation) on post-it notes and then put them on flipchart on the wall like a timeline.
* Suggest using the steps in CVA SOPs template as a starting point (adapting where necessary)
* Some steps may be overlapping timewise, so the wall may contain several overlapping timelines.
* Other groups can add post-it notes if something is missing, and comment if they disagree, until there is a common understanding.
* The process and timeline can be left on the wall for the rest of the workshop or written up neatly on flipchart but kept in the room until the workshop is over.
* Facilitator should take it down at the end and document it all on a computer.

Groups to summarise highlights of their results in plenary (15 mins)

**Handouts/materials:** Current NS SOPs or CVA SOPs template, split by project cycle step to go on Google docs on each group computer + feedback sheets.

LUNCH BREAK

Afternoon

**13.30– 15.30 Drafting NS CVA SOPs (steps, actions and documentation)**

**In Brief** - Group work to draft and propose the main CVA steps and sub-steps in initial draft skeleton form that the NS will need to follow in an emergency response, along with required documentation. This can then be developed further and finalised by the CVA Focal Point and Cash Preparedness Delegate following the workshop.

**Outcomes: CVA steps and sub-steps/actions developed for a short-form SOPs document, with suggested required documentation (i.e tool) per step.**

**Process:**

* To ensure this session builds on the earlier SOPs review/design session, beforehand facilitators should extract and pull over any relevant feedback specifically that relates to SOP steps and sequencing and group them into a new feedback sheet, in terms of a) what needs to added, b) what needs to be removed and c) what needs to be amended, per section. Also, d) if new steps were proposed (where SOPs are being designed for the first time)
* Divide participants back into three groups. Each group to take an CVA emergency response phase - Assessment, Response Analysis and Planning, Set-up and Implementation, M&E
* This time consider mixing up the groups to ensure relevant specialists are in each group for detailing the steps, e.g. logistics in set-up and implementation, M&E in monitoring and evaluation
* This session will start to draft and develop the key CVA steps from assessment of needs to identification all the way up to monitoring, and reporting. Each group to:
  + List down in a table the key steps and sub-steps
  + Define documentary requirements per step (Note these can be specific links to existing or to ideal tools, not yet in place – there will be a tool development session later)
  + Briefly list who is involved (Note this also will be worked up into a full RACI in a later session)
* Participants should refer to previous feedback and either the NS SOPs they are revising and/or the CVA SOPs template as an example of good practice to follow/adapt.
* A Google doc table should be completed per step – example in the PowerPoint.

Groups to summarise highlights of their results in plenary (15 mins)

Handouts/Materials: Current NS SOPs or [CVA SOPs template](https://cash-hub.org/wp-content/uploads/sites/3/2024/03/2.1.e-CVA-SOP-template-1.docx) (handouts per person)

**END OF DAY for Participants**

**COFFEE BREAK for Faciliators**

**15.45 - 17.15 Agreement and finalising of key CVA steps and decisions [Faciliators and CVA Focal Point only]**

In Brief - Time for the faciliators and CVA Focal Point to check there is agreement on the proposed key CVA steps and decision points and once agreed, to type up identified key steps into the [CVA RACI template](https://cash-hub.org/wp-content/uploads/sites/3/2024/03/2.1.d-CVA-RACI-1.docx) ready for the developmennt of RACI exercise on Day 2.

**Outcomes: Agreed draft skeleton CVA SOPs steps and sub-steps; Draft RACI template prepared with agreed steps and sub-steps**

**DAY 2**

**Morning**

**8.30 - 9.00 Recap of Day 1**

**In Brief** – Summary of discussions that took place on Day 1, including an introduction to SOPs, review exercise of existing SOPs and RACI and the drafting CVA steps and documentation for the SOPs.

**Outcomes: Recap what was achieved of Day 1 and clarity on objectives of Day 2.**

**Process:**

* Summarise sessions from Day 1 and hear participants experience of the group work
* Outline the agenda for Day 2
* Time for any questions, concerns or clarifications on the process

**9.00 - 11.00 – Drafting a roles and responsibilities matrix (RACI)**

**In Brief** – Group work to develop a RACI matrix, identifying who is responsible, accountable, communicated and informed, in each step.

**Outcomes: Development of first draft RACI matrix, for finalising outside of the workshop.**

**Process:**

* Facilitators to pull over the drafted SOPs steps from the previous day’s work into an empty RACI template. This session will build on the steps by defining the respective roles.
* Divide participants back into the same three groups that worked on the SOP steps development. Each group to take a CVA emergency response phase - Assessment, Response Analysis and Planning, Set-up and Implementation, M&E
* Ensure the relevant specialists are in each group for detailing the steps, e.g. logistics in set-up and implementation, M&E in monitoring and evaluation

**Materials/Handouts:** Current NS RACI and/or CVA RACI matrix template (handouts per person)

**COFFEE BREAK**

**11.30 -12.30 – Finalise timeline/flow charts and management approval requirements**

**In Brief** – Group work to pull together and finalize the drafted skeleton CVA SOP steps from the day before into a final timeline/flowchart and to agree exactly where management decisions and approvals are needed. As part of this, a discussion should be held on the ambitions of the NS with regards timely response and consideration given to if some steps could be done at the same time and there if therefore the possibility to speed up some processes and decisions, in light of this ambition.

**Outcomes: Draft timeline (and optional flowchart), showing how many days each step should take, and where management decisions are needed.**

**Process:**

In plenary, hold a brief discussion on the NS ambition in terms of timely response. (This will likely be included the [CVA vision statement](https://cash-hub.org/wp-content/uploads/sites/3/2024/02/1.1.d-CVA-vision-statement-.docx))

Make a timeline and calculate how many days it takes to deliver CVA in a typical response (if CVAP has been done). Throughout the process, factor in throughout which steps can be done at the same time as others and ways that the process can be shorted in terms of timeframe. It is important to avoid just capturing how long it takes the NS normally.

Option to make flowchart for overall process (see p 7 CVA SOPs template)

Materials/Handouts: [CVA SOPs](https://cash-hub.org/wp-content/uploads/sites/3/2024/03/2.1.e-CVA-SOP-template-1.docx) p6 and 7

**LUNCH BREAK**

**Afternoon**

**13.30 – 15.30 Review of NS CVA tools mapping [Optional session]**

**In Brief** – Building on the mapping of the existing tools provided by the CVA Focal Point (collected in advance) this session will focus on what tools needs to be adapted and/or still developed, linked to the different SOP steps agreed in the workshop. Note this is a starting point only and a full tools development exercise will need to be completed in its own dedicated follow-up workshop.

**Process:**

* Presentation on the existing tools mapping completed by the CVA Focal Point (10 mins).
* In 4 groups this time (Assessment, Response Analysis and Planning, Set-Up and Implementation, M&E)
* Agree which tools the NS has in place per CVA step (Note this may require some discussion on the final status, if a combination of IFRC and NS tools have been used)
* Agree what needs to be adapted
* Agree what needs to still be developed
* Assign responsibilities for who will work on what

**COFFEE BREAK**

**16.00 – 17.00 SOPs - next steps?**

**In Brief** – Final session to wrap up the workshop and discuss what will happen next once the SOPs are in place, how they will be updated, and troubleshooting for when an NS may need to deviate from agreed procedures. The process for finalizing the SOPs document and approval process should also be discussed, as well as trainings.

**Outcomes: Understanding of next steps following the workshop for finalising and approving the SOPs, rolling out of trainings, testing SOPs in simulation and pilots as well as SOPs revision process and troubleshooting.**

**Process:**

* Power Point presentation
* Plenary discussion and Q&A
* Final wrap up and AOB in relation to SOPs or RACI