Revised CI MS and Safeguarding Standard

Roll-out phase – Second step

Training module for CIMS coordinators and assessors (*April 15 - 30, 2021*)

Terms of Reference

Introduction and background

Since 2019 Caritas Internationalis has strengthened its work to mainstream safeguarding across the Confederation. One of the key pillars of this work is the development of a fifth Management Standard on Safeguarding that is now fully embedded in the official organisational assessment tool of the Confederation, the Caritas Internationalis Management Standards (CI MS).

All the revised tools and related accompanying documents are now available on the CI Baobab platform. Assessment against CI MS with the 5th Standard is a requirement for all MOs of the Confederation, and according to the decision of the Representative Council all MOs are invited to do the (self) assessment by June 2021.

The revised CI MS are in force since January 1, 2021 and the roll-out phase started on February 10, 2021, with a series of introductory webinars for Regional secretariats, directors of all MOs, responsible persons for safeguarding and institutional development and capacity strengthening (IDCS). This first step of the roll-out phase ended on March 17 and, after a special session to train new CI MS coordinators, the training of CI MS coordinators and assessors on the Safeguarding Standard will start from April 15.

In order to support MOs in their assessment process, it is important to provide the CI MS coordinators and assessors with all necessary information to lead the assessment process, such as: what the main changes are, what the key assessment tools are, how to use them, how to assess the Safeguarding Standard, etc.[1]

For all new CI MS coordinators there will be a preliminary training session on the basic knowledge of CI MS (from March 30 until April 13), so that they can have a comprehensive vision, actively participate in this step and be able to lead the internal assessment process.

The training module for CIMS coordinators and assessors will be organized by Region (and by language where/if necessary), and facilitated/conducted by the CI IDCS Unit and the Safeguarding Task Force, in collaboration with the Regional secretariats.

Objectives

This training helps participants to:

- acquire additional knowledge about the newly revised CI MS tool with a specific focus on the 5th Standard on Safeguarding;
- increase awareness on the safeguarding standard, its contents and the Confederation's mechanism to assess compliance of each MO with the safeguarding requirements;
- get familiar with the new tools, supporting documents and methodology for the assessment.

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[1] *For the CI MS assessors along with the safeguarding assessors a separate module is being developed where specific information on the external assessment, available tools, report writing, etc. will be tackled.*

Expected results

- Participants are duly informed on the revised CI MS and especially on the Safeguarding Standard and familiarized with the new tools and related supporting documents;
- Participants are able to conduct the assessment against the safeguarding standard with knowledge of contents and documents to be provided;
- MOs commits to conduct the full CI MS assessment and, where it is already done, do the assessment only against the Safeguarding Standard.

Indicators

- All Regions have majority of the coordinators and assessors trained (at least 60%);
- All trained CI MS coordinators are able to conduct the (self) assessment;
- Number of assessments against the Safeguarding Standard conducted by the end of 2021;
- Increased number of full CI MS assessments conducted by the end of 2021.

Methodology and target groups

The training module will be organized online through the Zoom platform.

It will be interactive and will include presentations to show the new standard and the assessment process. It will have a practical approach with exercises, case studies and possibility to test the tool. There will be as well some space reserved for interaction, discussions and question and answer sessions.

As a precondition to attend this training, each participant will have to enrol and absolve the **two e-instruction modules** available on the Baobab platform, that aim to support MOs to familiarize with the new tool and the Safeguarding Standard[2], namely:

- ✓ **Revised CI MS Tools and Scoring (EN)**: https://community.caritas.org/learning/courses/12
- ✓ **Management Standard on Safeguarding (EN):** https://community.caritas.org/learning/courses/13

Beside this, it will be strongly recommended that participants before the training read the available ***Reference Guide for CI MS coordinators and assessors*** (https://community.caritas.org/intranet/documents/#list/11754) that provides clear guidance and step-by-step instructions on how to implement the overall CI MS assessment process, from the self-assessment until the development of the improvement plan.

A reading of the specific ***Guidance Note for the Standard on Safeguarding*** will also help to have a clear overview about it and formulate questions for clarification and better understanding (https://community.caritas.org/intranet/documents/#list/12290).

Having in mind that the available time for the training is very limited, it is crucial that participants will get familiar with the current changes in the CI MS and its tools, read the available materials, so that

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[2] *MOs who cannot access to Baobab are recommended to contact their respective Regional Secretariat and ask for the tools and documents. In any case, they can give priority to the reading and analysis of the CI MS Reference Guide and the Guidance Note on the Safeguarding Standard as the most comprehensive documents on these subjects.*

they can participate effectively in the training and rather focus on discussions, sharing concerns, ask questions, etc.

The sessions will be facilitated by the IDCS Unit of the CI General Secretariat in cooperation with the Regional Secretariats.

The training will be organized by Region and by language where/if necessary with max 20-25 participants)[3]:

Per region	Per language
Europe (EN)	Africa and MONA (EN)
	Africa and MONA (FR)
Oceania, Asia and N-America (EN)	LACAR (ES)

The training will be delivered in English, French and Spanish.

The sessions will be recorded and shared on the Baobab platform as well as all training materials (tools, presentations) to allow CI MS coordinators and assessors to revisit the training within their own organisations.

This training will be organized in one session only and will have a maximum length of **3 hours.**

However, taking into consideration the importance of the individual preparation and follow up which is to be considered as an integral part of the work, the whole structure of this step of the roll-out phase can be presented as follows:

1. *Individual preparation as a pre-condition for the online training session (2-3 hours):*
   each participant is requested to: study the e-instruction modules or/and the CI MS Reference guide and the Guidance Note on the Safeguarding Standard; look at the main tools, with a specific attention to the revised Organisational Review Tool (ORT);
2. *Online training session (3 hours)*
3. *Follow up:*
   dialogue with and support from the Regional Secretariat and the CI General Secretariat to conduct the assessment process and strengthen safeguarding mechanisms in each MO.

Timeline

The indicative date for this training module is *from April 15 to April 30, 2021.*

Contents

The training will cover different areas:

- Safeguarding and CI MS: why? Decision, changes and framework
- ORT and assessment process (against Safeguarding): how? Process and methods
- Management Standard on Safeguarding: key contents, key areas
- Supporting materials: available tools

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[3] *MOs of a Region with specific language needs can join the training of another Region (e.g. Caritas Equatorial Guinea who is a Spanish speaking country can attend the LACar training session).*

Presentation of the training module: contents and resources

Title	Contents	Facilitator and time	Reference documents
Opening session	Introduction of participants Presentation of the module: objectives and agenda	10 min	
Safeguarding and CI MS: Why? Decisions, changes and framework (intro)	Safeguarding integrated in the CI MS tool for organisational assessment (why, how, main changes); Governance decision	15 min	Reference Guide Guidance note on Safeguarding E-instructions Summary main changes in the CI MS
Revised CI MS and Safeguarding Standard	Feedback from the individual preparation	15 min	
Management Standard on Safeguarding: key contents	Contents of the Safeguarding Standard: key areas, evidences (resource materials)	60 min	Guidance note Safeguarding Standard Training modules Safeguarding
Assessment process: How? Process and methods	From self-assessment to external assessment Options for assessment (full or stand-alone assessment) Level of compliance Role of (safeguarding) assessors	60 min	Reference Guide Guidance note on Safeguarding E-instructions Video on how to submit documents
Supporting materials and accompaniment to MOs	Presentation of all tools and accompanying documents and guidance on where to locate these on Baobab	10 min	Baobab platform
Way forward	Evaluation of training Specific needs/requests	10 min	Evaluation form