



# EXTERNAL EVALUATION

## June – August 2018

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FINAL REPORT – 8 OCTOBER 2018

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# Acknowledgements

Many thanks to all those people who participated in interviews and Focus Group Discussions for the evaluation and provided thoughtful and honest input.

Thanks in particular to Judith Greenwood, Geneviève Cyvoct and Bonaventure Sokpoh, who conscientiously oversaw the consultancy and the Secretariat Team for efficiently arranging the practical aspects of the evaluation.

The evaluation sought to draw out and synthesise views across the CHS Alliance and the wider humanitarian sector, however ultimately the views expressed in the report are those of the Consultant.

## List of Abbreviations

AAP	Accountability to Affected People
ALNAP	A global network dedicated to learning how to improve response to humanitarian crises
BOND	UK network for organisations working in international development
CAFOD	The Catholic Agency For Overseas Development
CEA	Community Engagement and Accountability
CHCF	Core Humanitarian Competency Framework
CHF	Swiss Franc
CHS	Core Humanitarian Standard
CWSA	Church World Service Asia
DCA	Dan Church Aid
DFID	UK Department for International Development
ECHO	European Civil Protection and Humanitarian Aid Operations
FTE	Full Time Equivalent
GTS	Ground Truth Solutions
GDPR	General Data Protection Regulation
HAR	Humanitarian Accountability Report
HDI	Human Development Index
HQAI	Humanitarian Quality Assurance Initiative
IASC	Inter-Agency Standing Committee
ICRC	International Committee of the Red Cross & Red Crescent
IOM	International Organisation for Migration
OECD/DAC	Organisation for Economic Co-operation & Development's - Development Assistance Committee
OFDA	Office of US Foreign Disaster Assistance
PSEA	Protection from Sexual Exploitation and Abuse
SEA	Sexual Exploitation and Abuse
ToR	Terms of Reference
ToT	Training of Trainers

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# EXECUTIVE SUMMARY

## 1. INTRODUCTION

The CHS Alliance is a membership organisation, headquartered in Geneva with a vision that people vulnerable to risk and disaster can influence and access quality assistance and hold organisations accountable.

The independent evaluation of the CHS Alliance covered the period from 1 Jan 2016 to 30 June 2018. The specific objectives of the evaluation, agreed in the Inception Phase (see Annex 2) and based on the ToR objectives (see Annex 1), were threefold:

- To analyse the CHS Alliance's performance against its core objectives over the last 2.5 years, using relevant OECD/DAC criteria.
- To review the outcome and benefits of the HAP International & People In Aid merger in 2015/16.
- To provide a feedback loop and recommendations for any course correction of the 2018-2021 strategy during the mid-term strategic review.

## 2. METHODOLOGY

A mixed method qualitative approach was adopted for the external evaluation, using a combination of 1:1 interviews, Focus Group Discussions and a Secondary Data review. See Annex 3 for the evaluation schedule and key informants. See Annex 4 for the full list of documents consulted.

In total, a sampled range of 65 key informants were reached, across the Secretariat, Board, Members, NGO's, UN agencies, donors, networks, other quality and accountability initiatives and academia.

Overall there is a reasonable degree of confidence that the evaluation has surfaced key issues about the programme. Nevertheless, there were a number of constraints including; balancing the key informant list, limited response rate from key informants, limited number of national members involved, limited numbers of field staff involved, evaluation conducted during the holiday season and finally a conflation between the CHS Alliance (the organisation) and the CHS (the standard).

Recommendations are included in the relevant sections of the main report in blue boxes, grouped below and summarised in Annex 5 – Management Response Matrix.

## 3. BACKGROUND

CHS Alliance membership has fluctuated over the last three years, with 28 new members joining and 66 leaving for a variety of reasons. The overall membership in 2018 is 155 organisations, which is a slight decline, although this is largely because there was a significant number of dormant members inherited at the merger whose membership has been terminated by the Board in recent months.

The CHS is one standard with three copyright holders, the CHS Alliance, Groupe URD and Sphere, who make up the CHS Management Group which facilitates the implementation and dissemination of the CHS. The advantage of having shared oversight of the standard is a wider breadth of agencies promoting the standard, however disadvantages mentioned were confusion about who owns the standard and complexity in terms of revising the standard.

The CHS Verification Scheme, developed by the CHS Alliance underpins the Alliances commitment to the CHS. The four verification options use the CHS Verification Framework. For CHS Alliance members, it is not necessarily a linear process and each verification option is valid in its own right - it is up to members to decide which option is best for their organisation. Some members and others were unclear about the various verification pathways and there may therefore be a need to improve communication in this area.

## 4. FINDINGS & RECOMMENDATIONS AGAINST OECD/DAC CRITERIA

### 4.1 Relevance

Most respondents felt the Alliance was very relevant. In order to continue to remain relevant, the Alliance needs to make a compelling offer to members as well as working harder to be more visible. The positioning and relevance of the Alliance needs to be clarified in relation to complementary initiatives, and it makes sense for the CHS Alliance to encourage alternative third-party verification options for their members.

*Recommendation 1 – In order to demonstrate the commitment of certified agencies to the CHS, the CHS Alliance should explore the use of a CHS kitemark for certified agencies, rather than the current HQAI kitemark.*

## **4.2 Effectiveness**

The **CHS verification scheme** was valued by members and even though self-assessment is a time consuming process, most felt it was worthwhile. A number of areas were identified for improvement, which the Secretariat is aware of, such as further guidance on the scoring grid and more support to members working through partners.

*Recommendation 3 – The CHS Alliance Secretariat should provide more guidance to organisations working through partners on how to conduct the CHS self-assessment.*

**Trainings and resources** were appreciated by members and others. PSEA training and resources were particularly commended. Training improvements were suggested in terms of a broader global reach, further development of the certified trainer scheme, further exploration of joint and integrated training and the expansion of on-line training.

*Recommendation 4 – the CHS Alliance should clarify with the CHS Steering Group the authorisation and quality assurance process for approving translations of the CHS and supporting tools, as well as updating the CHS Translation Guidelines.*

*Recommendation 5 – the CHS Alliance should encourage the CHS Steering Committee to consider how to broaden the reach of trainings into Asia, the Pacific and the Middle East, as well as targeting trainings into current humanitarian settings.*

*Recommendation 6 – in the short term, the CHS Alliance should start summarising feedback data from training courses into concise training reports, to more systematically track the outcome of trainings and the quality of training events. In the medium term, the CHS Alliance should undertake a formal and systematic review of the quality and utility of trainings and ensure the curriculum and teaching methods are regularly updated by subject matter experts.*

**People management** aspects were seen as effective. The Core Humanitarian Competency Framework was particularly highlighted. Members found the HHR Conferences valuable, especially for networking, but given the questions about the cost and impact of the conferences, it makes sense to shift the emphasis to learning events.

**Policy and advocacy** are bearing fruit and there are some notable successes although there was also a concern that the policy work is not strategic enough. There are a number of gaps where more effort will be required in order for the Alliance and the standard to have more visibility, particularly focusing on smaller national NGO's, UN agencies, donor governments, CEO's of larger agencies and even the corporate sector. In terms of learning, further work is needed to develop a well moderated Community of Practice.

*Recommendation 7 – the CHS Alliance should work with the CHS Steering Committee to systematically track CHS commitments from donors, since this information is important for advocacy.*

*Recommendation 8 – the CHS Alliance should build on the Strategy and 2018 Operational Plan to develop further advocacy and policy objectives, in order to give clear direction on who to engage with and how the Alliance wants key decision-makers in the sector to move on quality and accountability (for example; lobbying the UN and donors, which new members to seek after, key messaging on the importance and value of quality and accountability for members themselves to use to do their own advocacy and influencing, key messaging for donors themselves to use at multilateral level, clear 'policy asks'). The results of the engagement should be evaluated on a regular basis.*

*Recommendation 9 – the CHS Alliance should invest in the Resource Area on the website and turn this into a well moderated Community of Practice for accountability focal points, with key tools made widely and easily available to the whole sector.*

## **4.3 Efficiency**

The CHS Alliance has sought to spread financial risk across a range of income streams, which will need to be maintained and further maximised. Nevertheless the CHS Alliance will require ongoing donor funding for the foreseeable future. The Secretariat is lean, with only 11.2 FTE staff and there is therefore limited ability

to stretch into new activities, such as additional training or deployments. Programme outputs were reported to be on track and on budget.

#### **4.4 Impact**

It is too early to assess what real difference the CHS Alliance support and services have made to 'building a culture of quality and accountability,' nevertheless it makes sense to consider developing proxy indicators to define and track impact over the coming years. In the meantime, broadening the membership, developing more of a field presence and coordinating better on quality and accountability will have a positive effect on the impact of the Alliance.

### **5. FINDINGS & RECOMMENDATIONS ON THE MERGER**

The HAP International and People In Aid merger took longer than expected, but has achieved the intended outcomes, particularly in terms of simpler and more efficient standards. Some savings have been realised in terms of staffing costs. The original intention to consider a 'possible future move out of Europe' has not yet been explored due to the protracted and complex merger.

The merged organisation is still relatively new and sustained effort is needed on the improvement of IT systems and internal communication.

### **6. FINDINGS & RECOMMENDATIONS ON THE 2018-2021 STRATEGY**

Members familiar with the strategy thought it was 'fit for purpose' and were pleased with the direction the CHS Alliance is going. Given the safeguarding concerns in the sector, it makes sense to refresh the Theory of Change and objectives to reflect the changed context and relaunch the strategy following the mid-term review.

*Recommendation 10 – The CHS Alliance should refresh the strategy to particularly take account of the current concerns on safeguarding and in turn relaunch the strategy with strong communications to promote key messages.*

### **7. ADDITIONAL FINDINGS & RECOMMENDATIONS**

#### **7.1 Governance**

The Board and sub-committees were reported to be functioning well. Some governance issues were raised in terms of the Board size, frequency of meetings and Board composition, with a suggestion by two members to encourage a greater plurality of Board membership.

*Recommendation 11 - The Board should consider a mechanism for ensuring a greater plurality of Board membership, such as a certain number of people from a representative range of nominated groups on the Board.*

#### **7.2 Membership**

Engagement with members requires ongoing proactivity. The Secretariat was widely appreciated for being responsive and supportive to members and should continue to shift from being the initiator to seeing themselves as a resource and hub to members. Increased effort is needed on communications, both with members and more widely.

*Recommendation 12 – the CHS Alliance Secretariat should continue to make a paradigm shift from being the initiator to being the catalyst and enabler, with members in the driving seat.*

### **8. CONCLUSION**

Three years on from the formation of the Interim Governing Board in Nairobi in June 2015, the CHS Alliance has successfully established itself as a leading quality and accountability initiative. It has consolidated its membership and is providing a range of valuable services to members and beyond.

There are a number of threats to the Alliance's existence as well as huge opportunities to grow and have wider influence across the sector.

There are many learnings emerging from the evaluation which will need to be reflected on and addressed as part of the evolution of the Alliance.

# 1. INTRODUCTION

The CHS Alliance is a global membership organisation, headquartered in Geneva with a sub-office (currently hosted by CAFOD) in London, employing a total of 11.2 FTE staff.

The Alliance resulted from the merger of two quality and accountability initiatives, HAP International and People In Aid. It officially came into existence on 9 June 2015 at the Constitutive General Assembly meeting in Nairobi, Kenya.

The independent evaluation of the CHS Alliance covers the period from 1 Jan 2016 (when CHS Alliance staff contracts commenced) to 30 June 2018 and is the first external evaluation undertaken during the lifetime of the CHS Alliance, coinciding with the end of mission of the first CHS Alliance Executive Director.

The overall aims of an evaluation are usually 'accountability' (how well have resources been applied) and 'learning' (to facilitate improvement at programme and organisation level). The purpose of this evaluation was both accountability and learning.

The specific objectives of the evaluation, agreed in the Inception Phase and based on the ToR objectives, were threefold:

- To analyse the CHS Alliance's performance against its core objectives over the last 2.5 years, using relevant OECD/DAC criteria.
- To review the outcome and benefits of the HAP International & People In Aid merger in 2015/16.
- To provide a feedback loop and recommendations for any course correction of the 2018-2021 strategy during the mid-term strategic review.

Recommendations are included in the relevant sections of the report in blue boxes and summarised in Annex 5 – Management Response Matrix.

## 2. METHODOLOGY

A mixed method qualitative approach was adopted for the evaluation, using a combination of one to one interviews, Focus Group Discussions and email submissions to reach a sampled range of key informants from across the sector, as well as a secondary data review.

Robert Schofield, the lead Consultant, has over twenty years' experience in a range of leadership roles for NGO's, recent experience in the quality and accountability sector and several years' experience leading evaluations and reviews for NGO's and donors. Robert was the Coordinator of the Joint Standards Initiative in 2011/12, a one year process to seek greater coherence between users of standards, which led to the development of the Core Humanitarian Standard.

An Evaluation Task Force was established at the outset, to coordinate and manage the evaluation process, comprising; Judith Greenwood - CHS Alliance Executive Director, Bonaventure Sokpoh - CHS Alliance Head of Policy Advocacy & Learning, Geneviève Cyvoct - CHS Alliance Senior Quality & Accountability Officer and Robert Schofield - Independent Consultant.

### 2.1 Qualitative approach

A series of Key Informant Interviews were conducted with a sampled range of 65 stakeholders, both face-to-face and by skype/phone. A comprehensive list of key informants provided by the Secretariat was used as the basis to prioritise who to interview.

See Annex 3 for the list of key informants (in order to comply with GDPR, key informant names are only included where explicit consent was given) and travel schedule. Key lines of enquiry were explored during the interviews with questions tailored to particular groups.

The evaluation sought a balance of input from the CHS Alliance Secretariat & Board (20%), Members (50%) and the wider humanitarian community (30%), roughly in the proportions indicated. The final percentages suggested a reasonable balance as follows; CHS Alliance Secretariat & Board (29%), Members (45%) and the wider humanitarian community (26%)

Balance was also sought between different types of Board Members and CHS Alliance Members as follows:

Board Members, in terms of; gender, global north and global south, long service and recently elected. CHS Alliance Members, in terms of; gender, field versus HQ, global north versus global south, global networks and large agencies versus small agencies, partner-based versus direct operations, programmes versus Monitoring & Evaluation people, certified versus self-assessment members. Training workshop participants were purposively sampled from a range of trainings delivered over the last 18 months, based on locations and types of workshops. The four workshops selected were; CHS ToT in Freetown, Aug 2017. Investigations Training in Geneva, Nov 2017. CHS ToT in Copenhagen, Apr 2018. Investigations Training in Nairobi, June 2018. Two participants were then systematically sampled from each training and invited to interview.

Snowball sampling was used to identify selected field staff working for member agencies.

The Evaluator used an 'Appreciative Enquiry' approach to capture what had gone well, what could be improved and what should be done differently.

TABLE 1: Summary of Key Informants, by group

Stakeholder	Agencies	TOTAL
Secretariat staff	CHS Alliance in Geneva and London	10
Alliance Board members	Independent, Academia, British Red Cross, Norwegian Church Aid, Christian Aid, CAFOD, Coast Trust Bangladesh.	8
Alliance Members	Mission East, Islamic Relief Germany, SCIAF, ACTED, Oxfam International, Johanniter, World Renew, LWF, Helpcode Italy, Medair Lebanon, IMC, Save the Children International, Care International, Community World Service Asia, Mercy Malaysia.	17
Other humanitarian agencies	ICRC, ASB Germany, MSF UK.	3
Training course participants	Food for the Hungry International, UN MINUSCA, Oxfam South Sudan, Oxfam Chad, Oxfam Tanzania.	5
Quality and Accountability initiatives	Sphere, Humanitarian Outcomes, ALNAP, Ground Truth Solutions, CDAC, HQAI.	6
UN agencies	IASC Task Team, IASC Peer2Peer Initiative, UNICEF, IOM, OCHA.	5
Donors (Associate Members)	Danida, SIDA, DFID, Australia DFAT, Luxembourg MFA, Switzerland MFA, DEC.	7
Networks	SCHR, ICVA, BOND.	3
Other	Former People In Aid Chair.	1
<b>TOTAL</b>		<b>65</b>

Most of the interviews were conducted by phone or skype. Following completion of the interviews, an email submission was received from one of the training participants.

A survey of members was considered, but since CHS Alliance already conduct regular surveys of members, it was felt a better use of time was to maximise existing survey data.

## 2.2 Geneva visit

The Evaluator visited Geneva on 25-26 June 2018 to interview CHS Alliance Secretariat staff and other stakeholders based in Geneva and again on 6 August 2018 to discuss the draft report.

## 2.3 Desk Review of Secondary Data

A systematic review of key documents such as; statutes, annual reports, workplans, strategy documents, donor project proposals, member survey data etc was undertaken at the end of June 2018 and additional documents were provided and reviewed during the course of the consultancy. See Annex 4 for the full list of documents consulted.

## 2.4 Constraints & limitations to the evaluation

Overall there is a reasonable degree of confidence that the evaluation has surfaced key issues about the CHS Alliance. Nevertheless, there were a number of constraints and limitations as follows:

- **Key Informant List** – the original list provided by the Secretariat included approximately 120 individuals. This list was likely to include informants who are already well engaged with the Secretariat and who know and understand and are positive towards the work of the Alliance. The list was refined and some

additional informants added by the Consultant in order to balance the respondents, after which invites were sent to 102 people.

- **Limited response rate** – of the 102 people contacted, only 65 agreed to participate in an interview, 37 people did not respond at all or were not available for interview. Email prompts were sent to selected individuals, however this had very limited impact. A notice was placed on the website, informing CHS Alliance members and others that an evaluation was taking place with an invitation to make contact if they wished to participate, however this did not generate any responses.
- **Limited number of National members** – 8 out of a total of 52 current national members were approached for interview, however only 3 were available. (COAST Trust Bangladesh, Community World Service Asia and Mercy Malaysia).
- **Limited numbers of field level staff** – most of the member key informants were HQ level accountability leads, apart from 6 interviews with field level staff from; Medair Lebanon, CARE Chad, Oxfam South Sudan, Oxfam Tanzania, Oxfam Chad and UN MINUSCA.
- **Holiday season** – a number of key informants were on leave during the period of the evaluation.
- **Conflation between the CHS Alliance and the Core Humanitarian Standard** - it was clarified with respondents that the focus of the evaluation was the CHS Alliance rather than the CHS as a standard – however this is not straightforward given the common conflation between the two given they have very similar names, as well as the fact that the core business of the Alliance is to promote the CHS, so the two are inevitably entwined.

### 3. BACKGROUND

The mission of the CHS Alliance is to promote respect for the rights and dignity of people and communities vulnerable to risk and affected by disaster, conflict or poverty and to enhance the effectiveness and impact of assistance by building a culture of quality and accountability.

Below is a timeline showing some of the key dates in the lifecycle of the CHS Alliance:

- 23 Oct 2014 – HAP International and People In Aid merger was announced.
- 12 Dec 2014, the Core Humanitarian Standard was launched in Copenhagen.
- 9 June 2015 - the CHS Alliance held its Constitutive General Assembly meeting at the Mayfair Hotel in Nairobi, Kenya. An Interim Governing Board was formed, *to enable HAP International and People In Aid to transition in their alignment* (Article 34 of the Statutes). This arrangement remained in place until Nov 2016 when the first normal General Assembly took place.
- Aug 2015 – the first CHS Alliance Executive Director was appointed.
- 1 Jan 2016 – CHS Alliance contracts started.
- 3 May 2016 - HAP International and People in Aid formally merged.

#### 3.1 CHS Alliance membership

CHS Alliance membership has fluctuated over the last three years (see Chart 2 below<sup>1</sup>), with 28 new members joining and 66 leaving for a variety of reasons. The overall membership in 2018 has slightly declined although this is largely because there was a significant number of dormant members inherited at the merger whose membership has been terminated by the Board in recent months.

CARE International, Oxfam International and Action Aid International were all Federation members of People in Aid who transitioned to become 'Global Network' members of the CHS Alliance. Save the Children International changed its membership to a Global Network Member. Their 82 affiliates of Global Network Members are not included in the membership figures.

##### a) New members since 2016

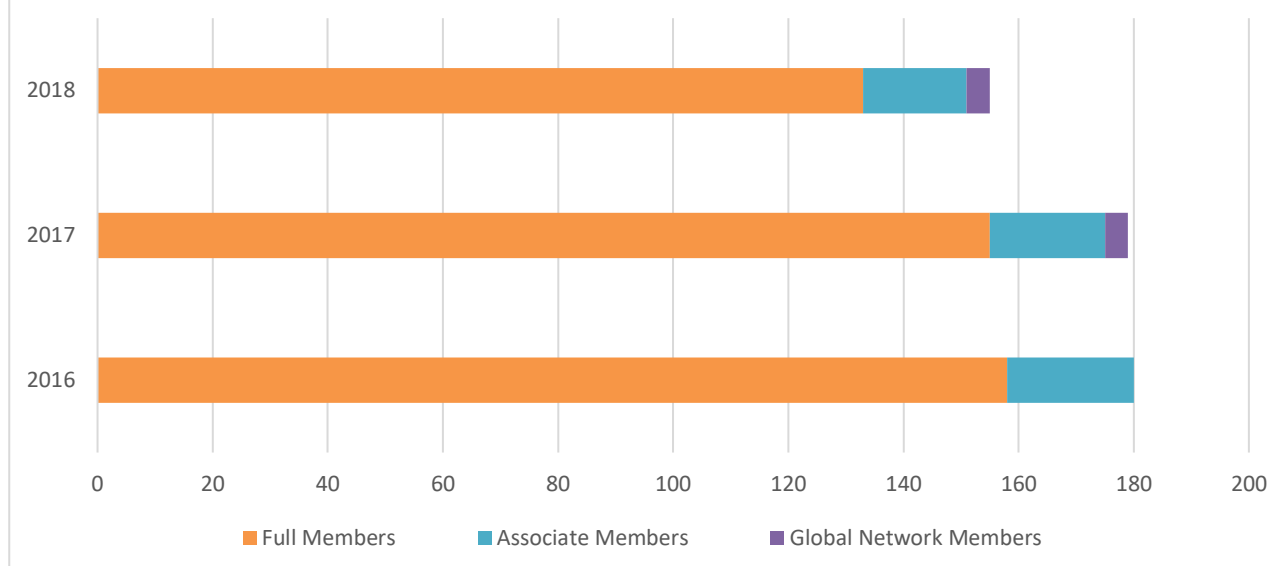
The 28 new members joining since 2016 is broken down by type of members and when they joined as follows; 2 Full Members joined in 2016, 20 Full Members joined in 2017, 5 Full Members and 1 Associate Member joined in the first 6 months of 2018.

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<sup>1</sup> By the end of 2016 there were 158 Full Members and 22 Associate Members. By the end of 2017, there were 155 Full Members, 20 Associate Members and 4 Global Network Members. By mid 2018, there are 133 Full Members, 18 Associate Members and 4 Global Network Members. Global Network Members currently represent 82 affiliates.



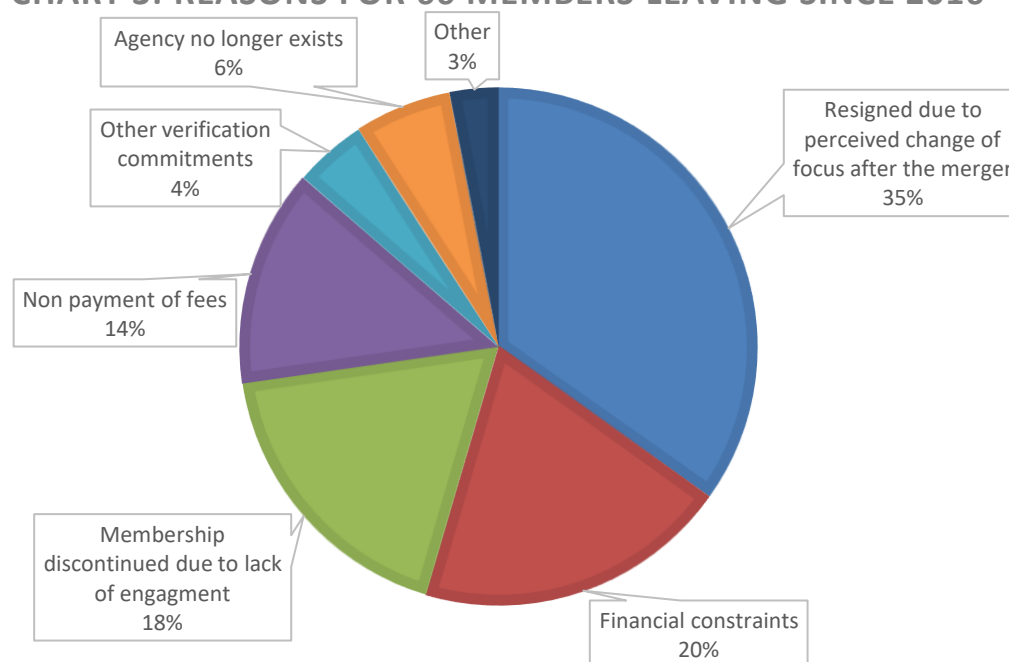
**Chart 2: CHS Alliance Membership 2016-2018**



**b) Reasons for change in membership numbers since 2016**

66 members left for a variety of reasons since the Alliance started, as indicated in Pie Chart 3 below:

**CHART 3: REASONS FOR 66 MEMBERS LEAVING SINCE 2016**

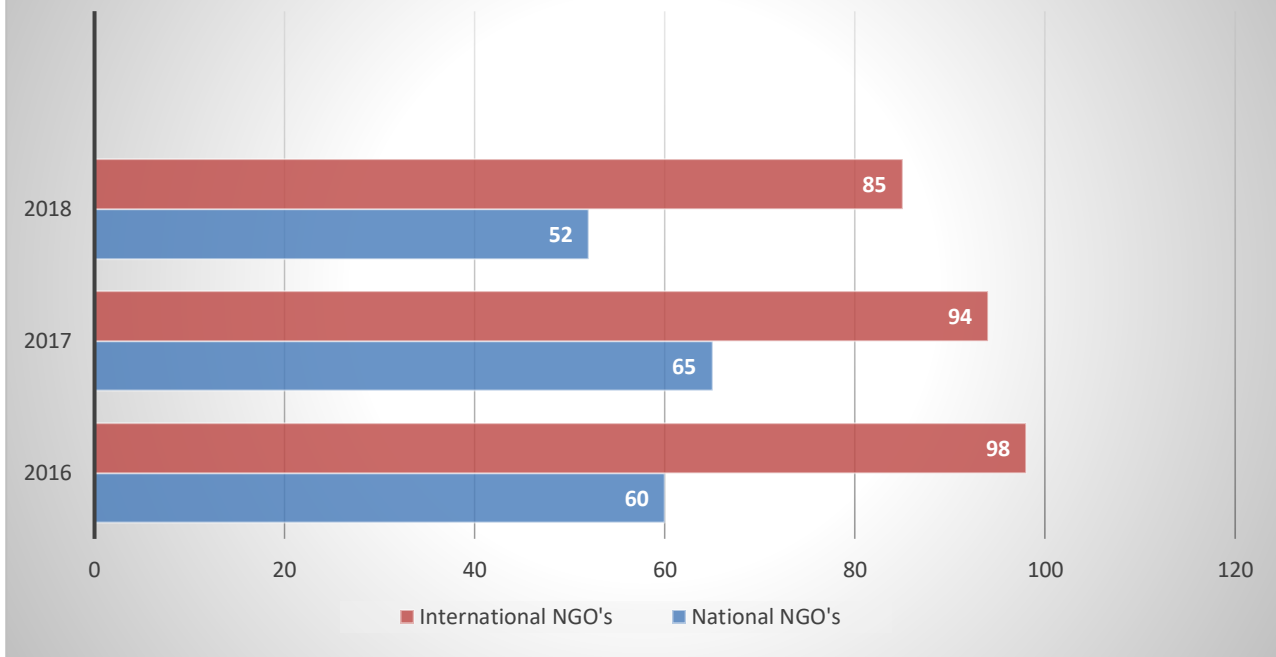


**c) National versus International Members**

The number of national/southern members peaked in 2017 at 65 and slightly declined in 2018 at 52, due in part to a number of members leaving as shown in the pie chart above. Chart 4 below shows the number of Full Members, divided up between International and National NGO's, but not including the 18 Associate Members.

The Alliance do not currently have clear criteria for defining a national NGO, which is important in order to be able to accurately identify and track the growth rate of national Members. The CHS Alliance should clarify the criteria used to define a national NGO for the purposes of being a member of the Alliance.

**Chart 4: Numbers of National vs International Full Members**



**d) Membership transfer from HAP International and People In Aid to CHS Alliance**

Membership transferred automatically from People In Aid members to the CHS Alliance, described by one person as 'at the stroke of a pen,' which meant some members were unaware they were members of the newly formed Alliance and led to a degree of disengagement at the outset from these members.

**3.2 CHS Management Group and Steering Committee**

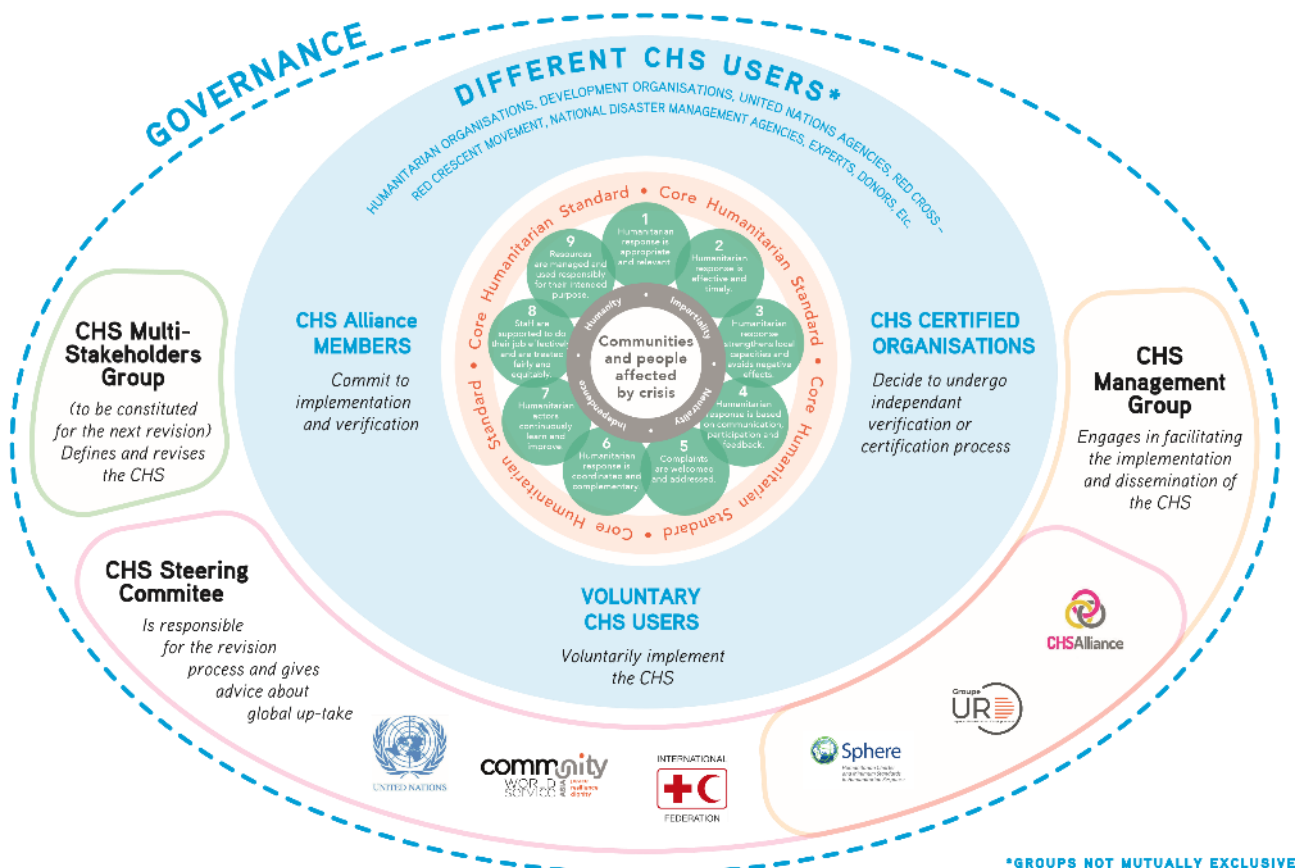
The CHS is one standard with three copyright holders, the CHS Alliance, Groupe URD and Sphere, who make up the CHS Management Group which facilitates the implementation and dissemination of the CHS.

The CHS Steering Committee, (comprising the above bodies, plus representatives from CWSA, IFRC and UN) are responsible for the revision process for the CHS. There were delays in nominating participants from the UN and Red Cross/Red Crescent Movement and despite the Steering Committee ToRs being finalised in March 2016, the first meeting did not take place until a year later, on 13<sup>th</sup> March 2017. Subsequently meetings have taken place every six months.

The advantage of having shared oversight of the standard is a wider breadth of agencies promoting the standard, however disadvantages mentioned by some outside the Steering Committee were confusion about who owns the standard and complexity in terms of revising the standard.

The diagram below shows how the CHS Steering Group, the CHS Alliance and the users of the standard fit together.

## GOVERNANCE AND USERS OF THE CORE HUMANITARIAN STANDARD



### 3.3 CHS Verification Framework and Scheme

The CHS is both a voluntary and a verifiable standard. The CHS Verification Scheme, developed by the CHS Alliance, was approved by the CHS Alliance Board in January 2016 and underpins the Alliances commitment to the CHS. Verification is a structured, systematic process to assess the degree to which an organisation is aligned with the CHS. The CHS Verification Scheme offers four verification options and all the options use the CHS Verification Framework. For CHS Alliance members, it is not necessarily a linear process and each option is valid in its own right - it is up to members to decide which option is best for their organisation.

Of the four options - self assessment and peer review are managed and supported by the CHS Alliance and this is an internal process. Independent verification and certification (third party audits) are carried out by an independent organisation and this is an external process.

The CHS Alliance holds the copyright and is the guardian of the CHS verification framework and scheme. Independent verification and certification against the CHS can be performed by an accredited certification body that has an agreement with the CHS Alliance to use the CHS verification framework and complies with the CHS verification scheme. The Humanitarian Quality Assurance Initiative, (HQAI) is currently the only organisation carrying out third party audits against the CHS.

Some members and others were unclear about the various verification pathways and there may therefore be a need to improve communication in this area.

## 4. FINDINGS & RECOMMENDATIONS AGAINST OECD DAC CRITERIA

The evaluation considered key lines of enquiry against OECD-DAC criteria<sup>2</sup> of relevance, effectiveness, efficiency, impact and sustainability.

<sup>2</sup> <http://www.oecd.org/dac/evaluation/daccriteriaforevaluatingdevelopmentassistance.htm>

## 4.1 RELEVANCE

*The questions addressed under relevance considered whether the work of the CHS Alliance is in line with members, donors and the wider humanitarian communities needs and priorities, as well as considering the CHS Alliance positioning and added value in the sector.*

A number of members feel deeply invested in the Alliance, especially the founder members of HAP International and People In Aid.

- “I cannot imagine life without the CHS Alliance because we were part of creating it, it’s like family” (Matthew Carter, CAFOD)
- “The CHS Alliance position is unrivalled in the sector” (Jodie Buchanan, DFAT)
- “The CHS Alliance is extremely relevant in getting our organisation more focused on Quality & Accountability...without the CHS Alliance I don’t think we would have made progress on AAP” (Michael Gall, IMC)

### **a) Relevance in terms of Protection from Sexual Exploitation and Abuse**

Many respondents felt that the CHS Alliance is more relevant and timely than ever – especially given the increased visibility of PSEA due to the 2018 UK safeguarding scandal<sup>3</sup>, which some saw as a wake-up call to the sector.

There is a threat and an opportunity to this issue, with some questioning why the standard and the Alliance did not achieve more in the prevention of sexual exploitation and abuse in the first place, whereas others suggested that the CHS is very useful to demonstrate that agencies are taking safeguarding seriously and have systems and procedures in place.

There was commendation from some that the CHS Alliance had positioned itself well as the body that provides clear operational guidance on PSEA (with the 18 PSEA indicators identified within the CHS). In fact, some took this further and thought the CHS should become the key PSEA standard and the Alliance should become the leading PSEA body and sharpen its focus around this subject area. There was recognition that HAP International and then the CHS Alliance had done well to promote PSEA over the last two decades, especially when it was off people’s radar before the most recent coverage.

Others wanted the Alliance to more proactively position themselves within PSEA debates - especially given the increasing fragmentation and duplication on PSEA - and to gain greater visibility for the Alliance’s presence and expertise. There was a sense that given the PSEA skills in the Secretariat and amongst Alliance members, they should have intensified their response, as well as reinforcing Alliance members with key messaging and initiating debate and discussion. A number of people mentioned the missed opportunities and the need to have more visibility in the safeguarding and PSEA discussions. In that respect, one donor suggested that the “CHS Alliance needs to ride the wave rather than drown in the wave”. Having said that, according to the Alliance Executive Director, the CHS Alliance have had extensive discussions with DEC, DFID and others on safeguarding, attend the IASC PSEA Task Force, organised a webinar with BOND and published a joint open letter on safeguarding with HQAI.

The BOND Safeguarding Conference on 21 August 2018 and the DFID Safeguarding Summit in October 2018 are two important and imminent forums where the Alliance should seek engagement.

### **b) Relevance of the CHS Alliance membership proposition**

In order to demonstrate ongoing relevance in a competitive quality and accountability environment, it was widely agreed that the Alliance needs to make a clear and compelling offer to members, as well as working harder on being more visible through its members. It was also recognised that this remains a huge uphill struggle within the sector, because of ‘an inbuilt resistance to standards,’ as one of the Board members put it.

Some of the key elements of the membership offer that were highlighted and appreciated by members included:

- The Alliance as an objective outsider, able to provide a quality check on members self-assessment.

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<sup>3</sup> <https://www.thirdsector.co.uk/more-500-reports-safeguarding-incidents-weeks-oxfam-scandal-broke/governance/article/1462569>

- Self-assessment as a driver of internal improvement processes on quality and accountability, as well as demonstrating to external stakeholders that members are committed to quality and accountability and continuous improvement.
- A guardian of the CHS verification framework and scheme and shared guardianship of the standard and promoting the standard.
- Focal point for technical resources, support and advice.
- A global platform for sharing and learning on quality and accountability.
- Enabling members to influence and reform the wider system through.

### **c) Relevance of People Management aspects**

A number of respondents, particularly former People In Aid members were concerned that the people management aspects have diminished since the merger and those members who were mainly interested in people management were reported to be disillusioned and ebbing away.

The People Management team consisted of four people in 2017 but is now reduced to one person and a comment was made that the intellectual capital on people management has dissipated with all the former staff leaving (both former People In Aid staff who left in 2016 and HR Project staff leaving once projects ceased).

The HR Projects were regarded as valuable and relevant by members, but there was recognition from the Secretariat that it was time consuming to inherit / transfer the projects from People in Aid to the Alliance, especially in terms of the admin burden.

Whilst some recognised there was a vacuum in terms of people management, it was also pointed out that it is not necessarily the role of the Alliance to fill this space.

### **d) Relevance for field workers**

The services and support of the CHS Alliance are unlikely to have high visibility amongst field workers, since their connection to quality and accountability is likely to be through their own agencies. Nevertheless, a proxy measure of relevance for field workers is their visibility and awareness of the CHS as a standard.

CHS Alliance members suggested there was very little visibility of the CHS standard especially at field level and in Clusters. One member said, “uptake is growing – but there is still a long way to go and we need to work harder at connecting with smaller national organisations” and an Associate Member said, “The CHS is far from being mainstreamed.”

It is noted that the CHS Alliance is only one of the three copyright holders and promoters of the CHS, but the comments above demonstrate that in order to gain greater relevance and visibility for field workers, a more concerted effort will be required by all three copyright holders.

### **e) Relevance for the humanitarian development nexus**

There were calls for the CHS Alliance to broaden its focus and appeal beyond humanitarian actors to the wider development sector. This was especially a concern for some of the donors and dual mandate agencies. It was reported that having ‘humanitarian’ in the title of the Alliance and the standard can lead to scepticism amongst development colleagues, however it was recognised that simply removing the word would not necessarily help, its more about persuading development actors of the value of the CHS commitments across mandates.

### **f) Relevance and positioning on the CHS Verification Framework and Scheme**

It is important to clarify the positioning and relevance of the Alliance with complimentary initiatives such as Sphere and HQAI. One respondent felt that the Alliance “should position themselves more robustly” and went onto say that “there is a danger if they don’t that they will disappear into the rainforest.”

### **Humanitarian Quality Assurance Initiative - HQAI**

It was initially envisaged that HQAI would only audit agencies against the Core Humanitarian Standard, however, the HQAI Constitutive General Assembly in 2015 adopted statutes which include reference to the CHS ‘and other standards’. Having set up all the structures and systems, HQAI are interested to audit against other standards and commitments, for example, auditing agencies against their own agreed commitments.

HQAI are currently in the process of being accredited by ACCREDIA (the Italian standards national accreditation body) to certify against the CHS, following the ISO relevant standard on auditing and managing certificates. This process should be concluded by the end of the year.

It was reported that several CHS Alliance members mistakenly referred to being 'HQAI certified' rather than 'CHS certified' – partly because of the HQAI branding of the certification. A number of people suggested it would help to have a CHS kitemark, since agencies are audited against the CHS, rather than using the HQAI kitemark, which would also be more consistent with other industry kitemarks such as ISO, which references the relevant standard rather than the auditing agency.

**Recommendation 1 – In order to demonstrate the commitment of certified agencies to the CHS, the CHS Alliance should explore the use of a CHS kitemark for certified agencies, rather than the current HQAI kitemark.**

Three members stated that once they are certified by HQAI they are unsure if they will remain CHS Alliance members, because they *perceived* that all the Alliances services and resources are leading towards certification and there is therefore limited added value for them beyond certification. Others saw the value of continuing Alliance membership beyond certification, for ongoing support and promotion of the CHS.

A pre-audit self-assessment process is offered by HQAI as the first stage of the third-party verification, using the CHS verification framework. The HQAI self-assessment is only a desk review exercise, because their auditors go to the field programmes to verify, whereas the CHS Alliance self-assessment process is more in depth because there are no external auditors involved. Some donors and members did not think it was helpful to have two different pathways for self-assessment via CHS Alliance and via HQAI using differently branded tools; it was reported that the overlap creates confusion and competition.

HQAI is formally an association that can have up to 25 individual members. HQAI members provide a variety of expertise and a pool of people who can sit on their Board. They do not charge membership fees and whilst some of the members may overlap in terms of agencies, there is unlikely to be any competition for members.

HQAI offer a subsidy to small organisations for which cost would be a barrier to access its services. However the uptake of the service is slower than initially anticipated. Five organisations have been subsidised so far and four more are in the pipeline. HQAI's subsidy fund is managed by an independent committee. Up to 90% of audit costs can be subsidised.

Some respondents felt strongly that there should be alternative third-party verification options available in addition to HQAI, especially because of the high cost of HQAI audits and the resulting perceived barrier to southern agencies, as well as the lack of competition with only one provider of this service currently.

**Recommendation 2 – the CHS Alliance should explore a broader range of accredited organisations able to offer third party verification options.**

HQAI was not perceived as a significant threat to the Alliance given the very high cost of their audits, their limited visibility in the sector and that fact that they only offer audits but do not provide advice and support, nevertheless there is a need to make greater efforts to clarify links between the organisations and differentiate between the two.

HQAI statutes require one of their Members to have 'a close connection with the CHS Alliance'. With the departure of the current Executive Director, HQAI suggested that the new Executive Director did not need to be a member of the HQAI Board and instead they could be a member of the HQAI General Assembly. This helps to address some concerns of CHS Alliance members concerning a conflict of interest with CHS Alliance being represented on the HQAI Board. An agreement is currently being drafted between the two organisations on the use of the CHS verification scheme.

## **Sphere**

Many recognised the inevitable competition for primacy between Sphere and the CHS Alliance, particularly given Sphere's strong brand and visibility across the sector – and especially with the full integration of the CHS into the latest revision of the Sphere handbook and a new initiative in July 2018 to broaden Sphere

membership<sup>4</sup> beyond the original sixteen member Sphere Project Board and the introduction of a similar fee structure to the Alliance.

The CHS is both a voluntary and a verifiable standard and both approaches are regarded as equally valid. This prompts a deeper question about the messaging and approach taken by the CHS Alliance and Sphere to promote the CHS. These issues and interdependencies should be clarified and addressed through the CHS Steering Committee.

## Relevance summing up

Most respondents felt the Alliance was very relevant for a variety of reasons, including; alignment with their core organisational values; the impact of the Alliance and its services on driving internal change and improvements within organisations, as well as the importance of having an entity to hold and promote the standard.

In order to remain relevant, the Alliance needs to make a compelling offer to members as well as working harder to be more visible, especially in the global south, with field workers and across the humanitarian and development nexus.

The positioning and relevance of the Alliance needs to be clarified in relation to HQAI and Sphere, and it makes sense for the CHS Alliance to encourage alternative third-party verification options for their members.

## 4.2 EFFECTIVENESS

*Effectiveness questions considered the extent to which results have been achieved by the CHS Alliance since 1 Jan 2016 and whether members have found the services provided useful and effective.*

The CHS Alliance Statutes provided the foundation for the 2016 and 2017 workplans and 2018 Operational Plan objectives. The table below maps the objectives against the statutes to show the core strategic threads running across the last 3 years.

**TABLE 5: Mapping of Statutes and CHS Alliance objectives from 2016-2018**

CHS Alliance Statutes - Article 5	2016 & 2017 Workplan Objectives	2018 Operational Plan Objectives
Strengthening the capacity of individuals and organisations and systems to deliver quality and accountable assistance	Objective 1 - Support organizations to achieve better quality and more accountable assistance for crisis-affected communities and vulnerable people through the application of the CHS, other standards and good practices	
Leading and facilitating the development, promotion and maintenance of the Core Humanitarian Standard on Quality and Accountability		Objective 1 - The sector is commonly using the CHS as the benchmark for quality and accountability and people management
Managing the development, promotion and maintenance of the Core Humanitarian Standard monitoring, reporting and verification scheme	Objective 4 - Create a learning and improvement-oriented culture through robust monitoring, reporting and verification of the CHS	Objective 3 - A stronger and larger membership consistently applies the CHS and uses the verification scheme to continuously improve its results
Leading improvements in people management and engagement.	Objective 2 - Lead and improve the effectiveness of individuals and organizations through good people management and human resources	
Collecting and using evidence to influence policy and practice at local, national, regional and international level	Objective 5 - Be a thought-leader and convenor on evidence-based quality, accountability and people management, strengthening learning and influencing policy and practice at local, national, regional and international level	Objective 2 - The CHS remains relevant in a changing world
Stimulating and facilitating learning, continuous improvement and innovation to contribute to organisational and operational effectiveness.	Objective 6 - Support a better integration of humanitarian and development work and mutual learning through accountability and people management approaches	
	Objective 3 - Play a leading role in working	

<sup>4</sup> <https://spherestandards.org/about/members-and-network/>



	to prevent and address sexual exploitation and abuse in the sector, in cooperation with other stakeholders	
	Objective 7 - Engage with and maintain a strong membership and ensure the Alliance is sufficiently resourced to fulfil its strategic aims.	Objective 4 - Ensure the Alliance is sufficiently resourced and has robust structures, systems and policies in place to ensure that it can deliver on its strategy.

Rather than evaluating each of the broad objectives, the analysis below focuses on the core outputs of the CHS Alliance which relate closely to the above objectives.

## i) CHS VERIFICATION SCHEME, SELF-ASSESSMENT

### a) Obligation to undertake self-assessment

Completing a self-assessment has been widely promoted by the Alliance as a membership obligation<sup>5</sup>. However, the majority of members have not fulfilled this requirement and there seems to have been a misunderstanding about this obligation since the CHS Alliance Statutes state that an organisation is eligible for membership if it, 'has a documented organizational commitment to quality and accountability in its activities and management practices towards people and communities vulnerable to risk and affected by disaster, conflict or poverty'.

In April 2018, the CHS Alliance Board delegated authority to a Working Group comprised of three board members and four staff to review the membership obligation and the self-assessment process.

### b) Uptake of the different options offered by the CHS Verification Scheme

Between Jan 2016 and July 2018, 51 verifications were completed using one of the options of the verification scheme. This included; 29 self-assessments, 1 peer review and 21 external audits conducted by HQAI.<sup>6</sup>

The uptake of self-assessment is moving in the right direction, with increasing numbers of members taking up this option and the Alliance tracking results to identify trends. However, the 2016 Annual Review anticipated 100 agencies using one form or other of the framework by the end of 2017 which in hindsight was over-optimistic.

### c) Advantages and disadvantages of CHS self assessment

Despite being a heavy and time-consuming process, most who had been through self-assessment felt it was worthwhile, especially in preparation for certification and as a learning process. There was also recognition that positive and pragmatic changes have been made to the tool since it was first launched and that the guidance and support provided by the Secretariat was good.

"Self-assessment was useful to get buy in across our organisation and to have common language to talk about accountability. It was an incredibly worthwhile learning process – and we get a useful scorecard and roadmap out of the process"

CHS Alliance Member

Some of the areas for improvement included a number of suggestions to make it a more user-friendly process, for example having less repetition in the forms, reducing the long list of questions and indicators and a plain English edit to reduce jargon, as well as building up the knowledge base in the Secretariat to be able to answer all the members questions.

One of the donors made the point that "there is a need to balance a robust self-assessment process with a tool that is as light and user friendly as possible"

Based on consultations carried out with members, the Secretariat reported that they have made a number of recommendations to the Board appointed Working Group on how to make the self-assessment process more user-friendly. Following Board discussion, the Secretariat is now drafting revised guidance to the self-assessment tool, to be presented at the next CHS Alliance Board meeting.

### d) Self-assessment was perceived by some to be inherently biased

Concerns were raised by a number of members and others that an internal self-assessment process will always be perceived to be biased, especially compared to an external audit process, (with the temptation to

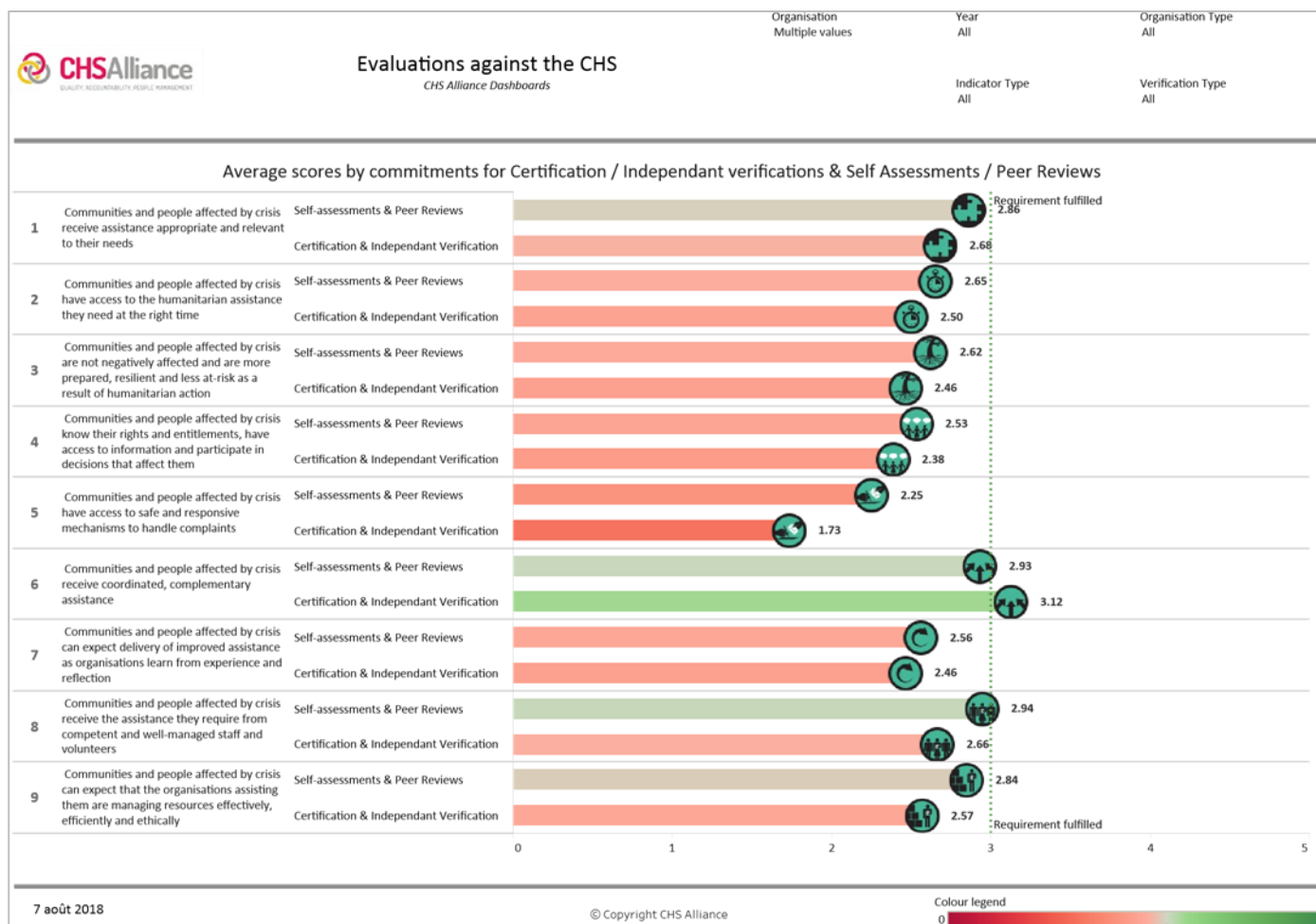
<sup>5</sup> See the membership page of the website for details: <https://www.chsalliance.org/membership/join-the-chs-alliance/full>

<sup>6</sup> Definitive data provided by the Secretariat on 8 Aug 2018



score oneself highly or for managers to expect staff to score favourably) and the challenge of genuinely comparing results across agencies. Having said that, other members mentioned the likelihood for some agencies to be even harder on themselves than outsiders and it was also noted that some members are seeking to mitigate bias by using people to do the self-assessment from outside their immediate teams. The Secretariat reported that any self-assessment scoring bias was the result of scoring grid misunderstanding rather than intentional bias.

The recent analysis below from the Secretariat demonstrates that the different verification approaches show similar scoring trends.



#### e) Self-assessment tool for Secretariats

Islamic Relief Germany used the new self-assessment tool for Secretariats developed at the end of 2017 and reported that they found it very useful for a non-implementing agency.

Given that the Alliance is promoting accountability and encouraging members to undertake self-assessment, it was wholly appropriate that the CHS Alliance undertook their own self-assessment in July 2017. This has led to the development of an improvement plan that is reviewed as a standing item at Secretariat staff meetings.

#### f) Self-assessment tool for Donors

The DEC initiated the development of the pilot donor self-assessment tool with the Secretariat because they committed to undertake a self-assessment but realised the original tool did not fit their circumstances. Luxembourg Ministry of Foreign Affairs and DFAT have subsequently been involved in the development of the tool, which will be piloted by Luxembourg in Sep 2018. Some aspects of the pilot tool are not yet complete, such as the report template.

#### g) Misunderstanding the self-assessment scoring grid

A number of members are misunderstanding the scoring grid – four members confirmed they had found the scoring difficult and would have liked clearer guidance on what the scoring means, particularly the difference between scores and wanted examples given for each of the scores. The Secretariat is aware of this issue

and is providing additional guidance in the form of webinars (see below) and bilateral support to members undertaking self-assessment.

Consistent scoring between members is crucial if the aggregated data is to have credibility.

#### **h) Self-assessment guidance for members working through partners**

A number of members working through partners noted that there was insufficient guidance provided for their particular circumstances and that the self-assessment would be burdensome for their partners. As an example, one member said, "Full self-assessment if done properly is a heavy process and we would struggle to take our partners through it."

This was also raised as a concern for smaller southern organisations with less developed processes. Further guidance is therefore required for members working with partners.

**Recommendation 3 – The CHS Alliance Secretariat should provide more guidance to organisations working through partners on how to conduct the CHS self-assessment.**

#### **i) Self-assessment Webinar**

A pre self-assessment Webinar started in March 2018 and is due to take place every other month with around twenty participants at each webinar. Members found this useful, but one urged that it was also conducted in French and Spanish to give greater reach.

#### **j) Advocacy with self-assessment data**

The two page summary of self-assessment data was very well used and appreciated by the Secretariat, members and others. However, some felt that more use could be made of this type of data to identify trends and issues to work on across the sector. For example, the self-assessment data shows that complaint handling is weak for members, so the Secretariat could use this information to determine workplan and training programmes to support members. The Learning Event in London in Nov 2018 will be focusing on what the Alliance has learnt on self-assessment.

#### **k) Self-assessment branding**

The CHS Alliance are considering branding their self-assessment process with their own logo (discussed at the last Alliance Board committee meeting in June 2018) which is a sensible way of promoting their brand and services and making a clear distinction with other verification options.

#### **l) Peer Review**

Mercy Malaysia and COAST Bangladesh took up the peer review option, with COAST reviewing Mercy Malaysia's processes in July 2017. It was regarded by Mercy Malaysia as a useful exercise but there is a need to ensure careful matching of members, for example humanitarian operational agencies with other humanitarian operational agencies, in order that they can understand and appreciate the different needs. Language issues should also be considered across nations. Further Peer Reviews should be encouraged between members.

#### **m) Peer mentoring**

Peer mentoring on self-assessment was an excellent idea, proposed by members and brokered by the Secretariat. A pilot is happening currently between Johanniter and ASB, with advice and support being provided by Johanniter. This approach is a good example of members being proactive and taking initiative.

#### **n) Translation of the CHS and supporting tools**

It was reported that there are several versions of the German translation of the standard in existence. Several organisations have translated it and there was an attempt to harmonise this through the Germany CHS Working Group (chaired by Johanniter), however the quality assurance process for translations was unclear and the guidelines from the Secretariat have not been updated since 2014 and are not available on the CHS or the CHS Alliance websites.

**Recommendation 4 – the CHS Alliance should clarify with the CHS Steering Group the authorisation and quality assurance process for approving translations of the CHS and supporting tools, as well as updating the CHS Translation Guidelines.**

### **ii) TRAINING & RESOURCES**

A number of training courses have been offered by the CHS Alliance to support members as follows:

- Introduction to the Core Humanitarian Standard
- Training of Trainers on the Core Humanitarian Standard
- CHS self-assessment workshop
- Complaints & Response Mechanisms
- Investigations Workshop
- Investigations Follow-Up Workshop
- PSEA & Investigations for Managers

Overall the feedback was positive about the training and resources provided by the Secretariat. Some of the comments included; “The Alliance provides good quality training,” “we received proactive and good advice on safeguarding and in country complaints handling,” “The Training Manager is extremely helpful and supportive,”

Some northern members thought trainings were too long, whereas some southern members thought they were not long enough.

#### **a) Effectiveness of training**

The effectiveness of training is unclear – 2017 and 2018 annual reports show a degree of progress in the percentage increase of numbers of people trained, but this does not necessarily indicate the effectiveness of the skills transfer.

The raw feedback data is reported to be used by the Training Team to adjust the trainings and is shared with the Executive Director and Finance Manager, however it is not summarised into post-training reports. This is a lost opportunity to make use of the data collected from all training participants. It would make sense to summarise the feedback and produce a concise report from each training which could then be used for trend analysis and review.

The outcome indicator for training is currently the number of CHS ToT graduates combined with the training output of the approved trainers. In addition, the Alliance may want to consider an additional measure that incorporates the number of agencies who have integrated CHS training into their own organisations, for example, the number of agencies who have used CHS Alliance resources to deliver internal CHS training.

#### **b) Cost of trainings**

The trainings operate on the basis of full cost recovery – however three members thought the trainings were too expensive (1,000 CHF per person is the standard discounted rate to members for a ToT training, although there is a further 50% discount available to small organisations. Accommodation and travel is an additional expense for agencies). This issue was regarded as a barrier to some agencies, particularly at field level.

#### **c) Location and frequency of trainings**

There was an appreciation that trainings were taking place in a number of different countries, however some NGOs and donors thought there was not a wide enough reach, especially into current humanitarian settings such as Cox’s Bazar and Syria. The main focus was seen as limited to Africa and Europe and some felt that trainings were not frequent enough.

Community World Service Asia (CWSA) are assumed to be the lead agency for training in Asia, however this is an informal arrangement and there is no MoU in place. CWSA would like more joint planning and collaboration with the Alliance for training in the Asia region. Some Asian members would like more training delivered in their region and there was recognition that CWSA may struggle to access some countries in the region.

**Recommendation 5 – the CHS Alliance should encourage the CHS Steering Committee to consider how to broaden the reach of trainings into Asia, the Pacific and the Middle East, as well as targeting trainings into current humanitarian settings.**

#### **d) Joint trainings**

There could be opportunities to explore joint trainings with other standards. For example, ICVA is exploring the possibility of integrated training for their members on Sphere, CHS, Protection Standards, Keeping Children Safe etc. BOND was interested to explore commonality on training between BOND and the CHS Alliance in the area of safeguarding. There has been some initial discussion between the training leads at CHS Alliance and Sphere about integrated and joint training, but this has not yet borne fruit. At field level especially, joint or integrated training could give wider reach and offer efficiencies.

This may raise a depth versus breadth issue – is it preferable to have many people knowing a little about the CHS versus a few people knowing a lot about the CHS?

#### **e) Business model to deliver training**

Trainings are mainly delivered by one CHS Alliance staff (to date no official CHS Alliance training is delivered solely by Consultants), however given that the CHS is a global standard it is not feasible to resource the training with a few individuals – other training agencies use a certified trainer scheme using freelance trainers and alternative e-learning pathways.

The Alliance is making efforts to increase the pool of trainers able to deliver training on the CHS, PSEA and investigations. CHS Alliance training workshops include an opportunity ‘trainee trainers’ to join the team and deliver sessions with mentoring and supervision from experienced CHS Alliance trainers. Upon successful completion, the trainees become ‘CHS Alliance approved trainers’. The pool has been under development since 2016, and currently comprises 66 approved trainers, of whom 22 are independent consultants, 40 are staff of member organisations and 4 are CHS Alliance staff. The CHS Alliance receives many enquiries about training on the CHS and on PSEA and refers these enquirers to the pool of independent consultants listed on their website.

If more certified trainers were used, then the Alliance training lead would have more time to have a greater role in assessing the quality of trainings.

**Recommendation 6 – in the short term, the CHS Alliance should start summarising feedback data from training courses into concise training reports, to more systematically track the outcome of trainings and the quality of training events. In the medium term, the CHS Alliance should undertake a formal and systematic review of the quality and utility of trainings and ensure the curriculum and teaching methods are regularly updated by subject matter experts.**

#### **f) PSEA trainings and resources**

Following the increased visibility of PSEA due to the safeguarding scandals that broke in the UK media in early 2018, CHS Alliance have sought to ramp up the training modules offered for Investigators. Despite the demand for this type of training, the Secretariat did not have sufficient resources to make the most of the opportunity, which means there is currently a waiting list of 60 people for the Investigation training.

#### **g) Investigation Training**

The Investigation Training is usually conducted by a CHS Alliance staff member plus a Consultant. It is a specialist training that no one else is delivering currently and is different from general safeguarding training. The training is expensive to deliver and the Alliance has been subsidising the course. Eight courses have already taken place so far this year and three more are planned.

The feedback on the Investigation Training and the Advanced Investigation Training was very positive. Participants were left feeling well prepared to make plans and deal with investigations and appreciated the follow up with the trainers. The simulation aspect of the training was especially appreciated by participants “the way the sexual harassment lesson was conducted, it became real, like it was really happening” said Juru Jackline from Oxfam South Sudan.

**“The Geneva Investigator training was very informative, networking with other attendees was useful and it was good to be sharing best practices.”**

Michelle Chasse, Food for the Hungry International

One Southern participant mentioned that the training was very good but not long enough, which they felt meant some of the sessions were rushed and some questions could not be answered.

Oxfam have contracted CHS Alliance to run a series of Investigation Trainings, which will see around 100 staff trained. Oxfam International reported that they were satisfied with the training.

The Investigation training materials were formally reviewed by Lucy Heaven Taylor in January 2017.

#### **h) PSEA Implementation Quick Reference Handbook**

One of the main learnings from the 2016 Independent Evaluation of the CHS Alliance Work Stream on PSEA by Humanitarian Workers was to develop a ‘one stop shop’ for PSEA resources. The CHS Alliance developed a quick reference handbook as a result which was well appreciated by members and others in the sector and reported to be ‘useful good practice for organisations’ and ‘up to date.’



The Australian Government DFAT PSEA Taskforce reported that they had used the Quick Reference handbook as well as other resources from the Alliance to review DFAT's current approach to PSEA.

BOND was asked by DFID to assume a convening role with British NGOs on safeguarding and reported that they had used the Quick Reference Handbook as part of their conversation with NGOs.

#### **i) Guidelines for Investigations 2015**

The guidelines were reported to be another useful resource, appreciated by members and others. For example, Alexandra Hileman, PSEA CBCM Project Coordinator at IOM said these represent “some of the clearest guidance out there on SEA Investigations.”

#### **j) CHS Training of Trainers**

The recent CHS ToT Impact Survey of ToT graduates and approved trainers in 2017 demonstrated an impressive 4,200 people participating in CHS training in 36 countries. 4,000 people participated in CHS training in 2015 and 2016, which therefore makes a combined total of 8,200 people trained over the last 3 years.

There was mixed feedback on the quality and effectiveness of the ToT training. One participant said the “ToT was one of the best training courses I have ever done, the stand out was the day on adult education methodology and then having a day to present.”

Whereas a number of others were concerned that there was not enough emphasis on the adult learning element (only one out of the four days), that there should be more emphasis on adapting the training to the local context and the training was not long enough for some Southern agencies and those less experienced who may need more time to grasp the materials.

PHOTO: Geneva ToT participants, October 2017



#### **k) On-line training**

The ‘Introduction to the CHS’ e-learning course was developed by the Humanitarian Leadership Academy, Sphere, Groupe URD and IECAH as an on-line resource. This is an excellent initiative and members wanted more of this type of training.

#### **l) Tools and resources on the CHS**

Some members would have liked the Alliance to provide more practical training materials and tools on the CHS – the training materials available from the Alliance were regarded as too theoretical and respondents would have preferred simpler resources that focused on how to roll out improvements, such as; how to develop policies, how to roll out the CHS to partners, template posters for members to be able to promote the CHS etc. Having said that one respondent liked the simplicity of the standard itself as well as the guidance.

“What I love about the CHS is that my mother could pick it up and she would understand what its talking about because there is so little jargon in it”  
CHS Alliance member

#### **iii) HR AND PEOPLE MANAGEMENT PROJECTS**

The people management aspects of the CHS Alliance were appreciated by members, including those members who were not previously part of People In Aid, who regarded these elements as ‘a bonus’. A number of HR projects were inherited from People In Aid when the CHS Alliance was formed and the Alliance committed to see through these obligations.

Most respondents had no or very limited knowledge of the various HR projects. Two members were aware of the projects but had engaged with them via other networks (SCHR and ACT Alliance). The particular projects mentioned by respondents included:

**START Network Talent Development Project, Coaching Programme** – the CHS Alliance supported a coaching network, which sought to build the capacity and competencies of over 1,000 humanitarian workers in Bangladesh, DRC, Ethiopia, Jordan and Kenya over a 3 year period to end Dec 2017.

**START Network Transforming Surge Capacity project** – the HR Good Practice component was supported by the CHS Alliance with a Consultant over a 3 year period to end Dec 2017.

**Core Humanitarian Competency Framework, CHCF** – The CHCF was reviewed in 2016 and various activities to promote its use continued throughout 2017. It was reported that the activities were delayed initially and that the Alliance should have more closely managed the Consultant who should have been contracted for tightly defined pieces of work.

Two members specifically mentioned using the Competency Framework and one remarked, “The Core Humanitarian Competency Framework is excellent, I love it!” (Dr Mahmoud Almadhoun, Islamic Relief Germany).

**Humanitarian HR Conferences** – People In Aid managed HHR Conferences for a decade and the CHS Alliance picked up this responsibility in 2016 and 2017, running four conferences (June 2016 in Barcelona, November 2016 in Nairobi, September 2017 in Helsinki and November 2017 in Bangkok). Members found the Conferences very useful as a forum for bringing together HR professionals.

The Alliance took the view that the conferences were resource intensive and had limited impact and have therefore decided to shift their emphasis to Learning Events. The first Learning Event will take place in London in November 2018 with a focus on what the Alliance and members have learnt on self-assessment. It is planned for future Learning Events to alternate each year with a location in the global south. Prior to this the last Learning Event was held in 2016.

Members were informed of the shift from HHR Conferences to Learning Events by the Alliance and were generally fine with it, although one member felt there was insufficient discussion and consultation about the change.



PHOTO: HHR Conference in Nairobi, November 2016

**Webinars with HR professionals** – a series of webinars were hosted by CHS Alliance and others, such as BOND and Humentum. These webinars were reported to be useful as part of a deliberate shift to attract a more global audience.

#### **iv) POLICY, ADVOCACY & LEARNING**

There was recognition that the Alliance was doing well to promote the CHS, as it is emerging in a wide variety of forums and documents, but there was a concern raised by a number of respondents that the Alliance was too opportunistic and *ad hoc* and not strategic enough in this area.

In addition, the effectiveness of the policy work was not sufficiently communicated and some felt that the momentum and opportunity coming out of successes at the World Humanitarian Summit were not being maximised. “Continued effort is needed to reinforce and consolidate gains” said one member.

A number of issues were mentioned as having hampered the Alliances policy efforts; the lack of solid evidence to base policy on due to the limited up-take of self-assessments, policy asks that were not specific enough and staff turnover with a new Policy Manager who will take a while to build relationships across the sector.

The Alliance Executive Director was reported to have good access to high level meetings and forums, although there was also a view expressed that this high level engagement could be even more ambitious.

PHOTO RIGHT: Humanitarian Networks and Partnerships Week, Feb 2018, Communications Officers from Groupe URD, Sphere and CHS Alliance.

#### a) Notable examples of influencing by the CHS Alliance

Respondents mentioned a number of notable examples where the CHS Alliance had been particularly successful at influencing over the last 3 years as follows:

- UK Parliament International Development Select Committee, May 2018 – the Alliance Executive Director gave oral evidence on sexual exploitation and abuse in the aid sector<sup>7</sup>. This opportunity arose as a result of Alliance Members mentioning the CHS in their evidence to the committee.
- The Sphere Handbook – the CHS will be fully integrated into the next revision of the Sphere Handbook which is due to launch in Oct 2018. This builds on the 2015 Sphere Board decision to replace their core standards with the CHS after which they produced an analysis and comparison document to explain the change to their constituency. The CHS Alliance were fully engaged in the revision process on the writing group.
- World Humanitarian Summit, May 2016 – CHS was referenced in the Secretary General's final report to Member States. The CHS Alliance were fully engaged in the special session on Putting People at the Centre and this session led to 105 governments and NGO's making a commitment "to adopt the Core Humanitarian Standard (CHS) and International Aid Transparency Initiative Standard, with clear benchmarks for achieving these through the CHS Alliance self-assessment tool."<sup>8</sup> The CHS Alliance could build further on the momentum from this session by following up directly with member states and NGOs on the commitments they made.
- ICRC report on Engaging with People Affected by Armed Conflict<sup>9</sup> - the report references the CHS.
- Humanitarian Passporting Initiative hosted by the Humanitarian Leadership Academy - People in Aid were involved at the outset and CHS Alliance contributed through the promotion of the CHCF and was a member of the Humanitarian Passporting Initiative and provided support to the Steering Committee in 2016 and 2017.
- Revised IASC Commitments on Accountability to Affected Populations, endorsed by IASC Principals in Nov 2017. These include Annex 1 'Guidance to the Commitments', which is a combination of the relevant CHS key actions and the Grand Bargain Participation Revolution recommendations and Annex 2 'A shortlist of resources' developed by the Task Team and CDAC Network to accompany the commitments. A number of respondents noted how strong and important the engagement was with the IASC PSEA/AAP Task Team, with good links to each other's websites and resources.
- IASC Best Practice Guide on establishing CBCM - specific references are included to the CHS Alliance website and deployable investigators.
- Grand Bargain Participation Revolution Workstream – the Alliance were invited into the workstream by the co-convenor as one of a group of experts. Many respondents were pleased that the Alliance were engaged in this workstream, with one person suggesting that "the CHS Alliance provides an important



<sup>7</sup> <https://parliamentlive.tv/event/index/620bcf77-ad6f-4607-8b3f-bcdb85edd613>

<sup>8</sup> <https://www.agendaforhumanity.org/explore-commitments/indv-commitments/?combine=Core+Humanitarian+Standard#search>

<sup>9</sup> <https://www.icrc.org/en/publication/engaging-people-affected-armed-conflicts-and-other-situations-violence>



voice for NGOs and affected people.” The workstream recommendations make specific reference to the CHS which it sees as an ‘essential element of effective participation’<sup>10</sup>.

- UN documents are increasingly referencing the CHS, for example the OCHA CERF Results 2017 report mentions on p76 how they assessed projects against AAP aspects as reflected in the Core Humanitarian Standard.<sup>11</sup> OCHA World Humanitarian Data and Trends 2017 has two pages devoted to the CHS<sup>12</sup>
- Good Humanitarian Donorship high level meeting on SEA in New York, June 2018, co-chaired by the Australian and German Governments - the Alliance Executive Director participated in the panel discussion on PSEA attended by 40 donors and this was well regarded by donors and others.
- Donor engagement – a handful of donors have made specific references to the CHS in their relationship with funding partners:
  - DANIDA - require funding partners either to be verified against the CHS or to seek verification.
  - Disaster Emergencies Committee – since July 2017, DEC have required their members to make a commitment to the CHS and provide evidence of measurable progress through external options in the CHS verification scheme – verification or certification. The DEC are not asking their members to be certified – the focus is on measurable progress year on year.
  - Scottish Government – a pre-condition for agencies accessing the £1M Humanitarian Emergency Fund is “Membership of the CHS Alliance and evidence of progressing with self-assessment against the CHS”
  - ECHO – a member reported that one of the conditions of receiving a Framework Partnership Agreement with ECHO is to participate in one of the approved accountability initiatives which includes the CHS Alliance.
  - OFDA – the OFDA 2018 proposal guidelines, section 0 – includes a series of questions on AAP for proposals to address.
  - BPRM – the latest guidance requires an accountability framework but does not detail what it looks like – although it references the CHS and the IASC Task Force.

**Recommendation 7 – the CHS Alliance should work with the CHS Steering Committee to systematically track CHS commitments from donors, since this information is important for advocacy.**

#### **b) Policy and influencing gaps**

A concern was highlighted that the accountability community is speaking to its own constituency and therefore ‘preaching to the converted’ rather than convincing the wider humanitarian community. In order to have more significant impact on building a culture of quality and accountability, the CHS Alliance needs governments, donors, UN agencies and a broader NGO membership to fully embrace and resource the CHS. This could include; CEO’s, Country Directors. Humanitarian Country Teams, NEAR Forum for local NGO’s, UN Country Heads and UN Regional Heads.

Policy and influencing gaps were identified in a number of areas by respondents, as well as a broader concern that members were ‘unsure what the Alliance are doing on policy and unsure how much of this was translating into real change on the ground’.

- Smaller national agencies – a number of members wanted to see greater efforts to reach smaller national agencies. The Secretariat is drafting a localisation policy and is considering CHS Alliance Focal Points.
- Rights bearers – a vacuum was identified in terms of who takes on the role of promoting standards in general and the CHS in particular, to civil society organisations and other bodies in the global south (rights holders include communities themselves, global south networks, advocacy networks, governments and others) to hold operational agencies to account.
- Emerging countries - such as AHA Centre (The ASEAN Coordinating Centre for Humanitarian Assistance on disaster management), China, Saudi Arabia etc.

<sup>10</sup>

[https://interagencystandingcommittee.org/system/files/final\\_participation\\_revolution\\_workstream\\_recommmendations.pdf](https://interagencystandingcommittee.org/system/files/final_participation_revolution_workstream_recommmendations.pdf)

<sup>11</sup> [https://cerf.un.org/sites/default/files/resources/cerf\\_rr\\_2017\\_en\\_0.pdf](https://cerf.un.org/sites/default/files/resources/cerf_rr_2017_en_0.pdf)

<sup>12</sup> [http://interactive.unocha.org/publication/datatrends2017/resources/WHDT2017\\_Final\\_Singles.pdf](http://interactive.unocha.org/publication/datatrends2017/resources/WHDT2017_Final_Singles.pdf)



- UN agencies – the UN Engagement Strategy developed by the Secretariat is a good start. A number of people mentioned the importance of further ramping up engagement with the UN, since the CHS was reported to be rarely mentioned by Clusters at field level or promoted by UN leadership on the ground. There was recognition that UN agencies are ultimately accountable to member states which may be a reason for the CHS having limited traction within the UN system, as well as the ‘single audit policy’ making it problematic to undertake third party verification against the CHS. It was suggested that it may be worth doing more research on why there is a reluctance for UN agencies to adopt the CHS. OCHA confirming their seat on the CHS Alliance Board was seen as an important step, as well as the UN Pooled Funds 2018 operational plan having specific references to CHS.
- Donor governments - particularly the large International donors, focusing on those who are most sympathetic. Members were unclear what the external engagement strategy is with donors, especially since members of the Alliance have a vested interest in donors adopting the CHS. It is positive that a number of donors are Associate Members, but a sustained PR effort is needed to convince donors of the value and usefulness of the standard, because a ‘so what’ attitude was reported amongst some donors. The Alliance needs to show donors how the CHS will solve their problems, which the Alliance Executive Director has done initially with DANIDA, at their request.
- CEO’s of larger agencies – a number of members mentioned the importance of winning support from SCHR Principals and heads of large agencies who in turn can have a significant influence on the sector.
- Corporate sector – there is a gap to be filled with the corporate sector increasingly involved in the delivery of aid. As one member put it, ‘it’s a jungle out there!’

#### c) Policy approach

A more systematic engagement strategy is required with donors, UN, members, Board and the Secretariat, with the development of key messaging to use at multilateral, bilateral and country level, including key stakeholders to be approached as part of the engagement strategy – this could build on existing advocacy initiatives such as the CHS Alliance open letter with HQAI on safeguarding which was well regarded and these types of papers can in turn target target messages on specific topics such as PSEA, AAP and localisation.

**Recommendation 8 – the CHS Alliance should build on the Strategy and 2018 Operational Plan to develop further advocacy and policy objectives, in order to give clear direction on who to engage with and how the Alliance wants key decision-makers in the sector to move on quality and accountability (for example; lobbying the UN and donors, which new members to seek after, key messaging on the importance and value of quality and accountability for members themselves to use to do their own advocacy and influencing, key messaging for donors themselves to use at multilateral level, clear ‘policy asks’). The results of the engagement should be evaluated on a regular basis.**

#### d) Learning

As a membership organisation, the CHS Alliance should be prioritising support to members on learning and knowledge management.

Some members make use of the ‘resource area’ on the website and appreciate it, however most members reported that the information was not well organised and that it was easier to simply ‘google’ for resources and/or email the Secretariat who were very responsive at sharing good practice materials. Most non-members were not aware of the resources available on the website, apart from some specialists such as the lead of IOM’s interagency PSEA programme.

An effort was made to launch a Community of Practice (CoP) in 2016 on the Slack Platform, however it was reported that not enough people engaged in the platform and as a result it ‘fizzled out’. There was recognition that these types of CoP’s need active facilitation.

**Recommendation 9 – the CHS Alliance should invest in the Resource Area on the website and turn this into a well moderated Community of Practice for accountability focal points, with key tools made widely and easily available to the whole sector.**

#### e) Humanitarian Accountability Report, HAR

The HAR used to be an bi-annual publication, which was postponed from 2017 until 2018 due to staff capacity. The next HAR is due out in Oct 2018, with a focus on change models in the sector, to be launched at ICRC. The collaboration between the Alliance and ALNAP on change models was regarded as useful.

Some respondents regarded the HAR as one of the key products to influence the debate on accountability.

**f) OCHA / Ground Truth Solutions / CHS Alliance Project in Chad, Oct 2017**

The Chad pilot project between OCHA, Ground Truth Solutions (GTS) and the Alliance is seeking to determine how the CHS is operating at a whole system level, through the eyes of end users. The approach is to get buy-in from the Humanitarian Country Team and a critical mass of agencies and thereby embed the CHS into the overall response and then for the Secretariat to provide close support to the Clusters, which is a more strategic approach than just working through individual members.

The project builds on the GTS Listen Learn Act project developed with DCA and Save the Children to look at how individual agencies were doing on their CHS commitments in Mali, Nepal, Ethiopia and Lebanon.<sup>13</sup>

CARE Chad were involved in the GTS survey of field staff at the end of May and are awaiting the results. The CHS Alliance consultation to assess training needs was reported by the Secretariat to have started in July 2018.

Several respondents commented that the Chad pilot was a good example of the potential for the Alliance to expand its role into the field and to liaise with other actors to have greater impact and influence.

The working relationship between GTS and CHS Alliance was reported to be very good.

Some challenges were faced at the start of implementation including gaining registration for GTS in Chad, which delayed the start and therefore a No Cost Extension has been agreed with the donor to Mar 2019.

Towards the end of the joint project with Ground Truth Solutions, the CHS Alliance lead Manager should seek to capture learnings.

**Effectiveness summing up**

The CHS verification scheme was valued by members and even though self-assessment is a time consuming process, most felt it was worthwhile. A number of areas were identified for improvement, which the Secretariat is aware of, such as further guidance on the scoring grid and more support to members working through partners. Peer review and peer mentoring are promising newer verification options which should be promoted and encouraged amongst members.

Trainings were appreciated by members and others, although the measuring of the effectiveness of trainings could be developed. PSEA training and resources were particularly commended. Better use could be made of the training participant feedback data. Training improvements were suggested in terms of a broader global reach, further development of the certified trainer scheme, further exploration of joint and integrated training and the expansion of on-line training.

People management aspects were seen as effective by those who were familiar with the various HR projects inherited by the CHS Alliance in 2016. The Core Humanitarian Competency Framework was highlighted for its usefulness. Members found the HHR Conferences valuable, especially for networking, but given the questions about the cost and impact it makes sense to shift the emphasis to learning events.

Policy and advocacy are bearing fruit and there are some notable successes in terms of influencing although there is also a concern that the policy work is not strategic enough. There are a number of gaps where more effort will be required in order for the Alliance and the standard to have more visibility, particularly focusing on smaller national NGO's, UN agencies, donor governments, CEO's of larger agencies and even the corporate sector. In terms of learning, further work is needed to develop a well moderated Community of Practice.

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<sup>13</sup> [https://reliefweb.int/sites/reliefweb.int/files/resources/Placing Accountability at the Heart of Humanitarian Assistance](https://reliefweb.int/sites/reliefweb.int/files/resources/Placing%20Accountability%20at%20the%20Heart%20of%20Humanitarian%20Assistance)

## 4.3 EFFICIENCY

*The questions addressed under the efficiency criteria included whether activities were resourced appropriately, whether programme outputs are on track and on-budget and how interventions have adapted to learning and monitoring.*

The CHS Alliance is funded from a number of income streams; donor grants, membership fees and cost recovery on trainings – which is important, to spread the financial risk.

### i) Donor funding

Funding to the Alliance started in January 2016, as there were officially no Alliance staff before this date.

Donors were all satisfied that activities and spending are on track, as per the reports received from the CHS Alliance. DFAT's Engagement Strategy with CHS Alliance showed 7 out of 20 activities were complete and 12 out of 20 activities were actively ongoing.

TABLE 6: CHS Alliance donor funding breakdown 2015-2018<sup>14</sup>

Donors	2015	2016	2017	2018
Australia - DFAT - Geneva Mission		29,660		
Australia – DFAT		186,100	190,100	189,625
CIGNA			5,546	
Cooperation Suisse en R.D.Congo		30,880		
DEC		29,262		
UK Department for International Development		220,908		
Germany Ministry of Foreign Affairs (Dec '16 - Dec '18)			303,226	330,711
HPI Secretariat		39,420	48,650	
Irish Aid		137,966	144,525	
Luxembourg Ministry of Foreign Affairs		54,725	54,325	116,000
Denmark Ministry of Foreign Affairs, Danida		102,862	102,500	182,600
PHAP			109,021	
République et canton de Genève		46,107		
SIDA, Jan 2016 – Dec 2018		236,720	167,541	178,361
SIDA – GTS/Chad project			349,447	
Solidarité Internationale		19,300		
START Surge		22,215	71,447	
START Talent		61,901	212,727	
Swiss SDC (from 1 Nov 2015)	100,000	150,000	150,000	150,000
University of Edinburgh			5,625	
<b>TOTAL</b>	<b>100,000</b>	<b>1,368,026</b>	<b>1,914,680</b>	<b>1,147,297</b>

Donor funding (summarised in Table 6 above), represents approximately 60% of the total income for the CHS Alliance in 2018.

Most of the core funding completes at the end of 2018 (apart from Danida funding, to the end of 2019) which means the Alliance will need to prioritise a compelling and relevant ask to donors to support ongoing activities.

### ii) Membership fees

Membership fees represent approx. 30% of the total income for the CHS Alliance in 2018.

Collecting fees from members allows the CHS Alliance to maintain its independent voice and reach, as well as encouraging a sense of accountability to its members.

<sup>14</sup> Data provided by the Secretariat on 16 July 2018

During the constitutive General Assembly in Nairobi in June 2015, a fee structure for the CHS Alliance was approved by the members. 2016-7 were transitional years for payment of fees. Due to the delays in merging HAP and People In Aid, the new fee structure was not properly applied at the outset. A new fee structure was developed in Summer 2017, which included a reduction based on countries with a middle or low HDI score to reduce rates for smaller agencies in the global south. The lowest rate is very reasonable at only 300 CHF per year and this was regarded as important to encourage more agencies from the global south to become members. This fee structure has been in place since 1 January 2018.

A number of agencies did not respond to the invoices they received for payment of fees. Article 13 of the CHS Alliance statutes clarifies that 'membership ceases for non-payment of dues for more than two years.' In April 2018, the CHS Alliance Board therefore dismissed nine members for non-payment of fees.

Given that the new fee structure is only six months old, it is probably too soon to assess the impact on national organisations applying for membership, but it would be worth revisiting this issue in future years because the aim of the fee reduction was to encourage membership from agencies in the global south. A rough assessment of new members joining from the global south by year is as follows:

- 2016 – 0 out of 2 new members were from the global south
- 2017 – 11 out of 20 new members were from the global south
- 2018 so far – 2 out of 6 new members are from the global south
- Pending applications – 6 out of 8 pending applicants are from the global south

Associate members pay a flat rate of 300 CHF (for those with an annual income less than 20 Million CHF) and this type of membership is only available to those who cannot fulfil the requirements to be full members such as donor agencies.

By June 2018, 75% of the membership fees had been collected, corresponding to 50% of members paying their fees.

### **Value for Money**

A number of members raised concerns at the fee levels and particularly questioned whether they represented good value for money, despite the Secretariat being responsive and hard working. A number of former People In Aid members had a large hike in fees, some were triple the cost and one member commented that it was 'difficult to justify the cost,' another said, 'the fees have increased but we don't feel we are getting more for our money.' Others felt they were 'reasonable' given the support received and the tools available and one member felt the fees were 'peanuts in the scheme of things.'

NGO's are likely to get increasingly tired of paying multiple fees to a plethora of networks and quality and accountability initiatives, as well as Board membership involvement, committees, participating in surveys etc.

The cost of joining the Alliance is high for some northern members, especially compared to the fees for some of the networks.

### **iii) Cost recovery on trainings and conferences**

Cost recovery on trainings represents approximately 10% of the total income for the CHS Alliance in 2018. The overall cost recovery amount was higher in previous years when HRR Conferences generated additional revenues.

### **iv) Responsive to learning**

Numerous examples were given that demonstrate the Alliance is seeking to be responsive to learning;

- Regularly reaching out to members through surveys, phone calls and webinars to understand members needs and orient the work of the Secretariat around members priorities.
- External evaluation of the PSEA training in 2016
- The CHS Alliance Secretariat self-assessment includes an improvement plan.

### **Efficiency summing up**

The Alliance has sought to spread financial risk across a range of income streams which will need to be maintained and further maximised. The Secretariat is lean, with only 11.2 FTE staff and there is therefore limited ability to stretch into new activities, such as additional training or deployments.

Programme outputs were reported to be on track and on budget.

## 4.4 IMPACT

*The questions addressed under impact included, what real difference CHS Alliance support and services have made to 'building a culture of quality and accountability'.*

The Core Humanitarian Standard and the CHS Alliance are still relatively new and it was widely recognised that it takes time to win public and donor support.

### i) Measuring impact

It is difficult to show genuine attribution between the Secretariat and members work on quality and accountability and changes in the culture and broader humanitarian system. One donor mentioned that they (the donor) are no longer trying to measure impact or even outcomes but focusing instead on outputs, another donor recognised that it is probably too early to assess genuine impact.

Proxy measures should be discussed and agreed with donors for the next programme cycle, to demonstrate and track potential impact and may include:

- number of agencies who have carried out one form of CHS verification, including self-assessment.
- number of members with a feedback mechanism.
- number of agencies who have used CHS Alliance resources to deliver internal CHS training.

### ii) Broader NGO membership

Many regard the Alliance as having a broad membership and the reach through larger members is seen as impressive – but there was also recognition that some smaller members have left (for a combination of reasons mentioned above) and greater efforts are needed to draw in more members from the global south and more members representing affected communities.

### iii) Field Presence – deployment mechanism

There was a call by some for the Alliance to have a more active field presence – as that is where they felt it mattered most – giving visibility of the standard to members as well as local affected people, who in turn could demand a higher level of quality and accountability. However, it was reported that the feedback from the membership during the strategy development process was to use the membership themselves rather than the Secretariat to have a deeper field presence.

Members could more actively promote the CHS and/or the Alliance have a more active field presence in current humanitarian crises such as Bangladesh and Syria. For example, the Secretariat could deploy for a few weeks to support members with training and mentoring, Members could second a staff member into new emergencies to support other members.

### iv) Coordination on quality and accountability

As mentioned earlier, there is duplication and fragmentation on quality and accountability.

A related issue is the language used on quality and accountability, which is evolving and is potentially confusing. For example, within the Red Cross & Red Crescent movement alone there are three different terms used for accountability; 'Community Engagement and Accountability, CEA' is the IFRC language, Accountability to Affected People, AAP is the ICRC language and CHS is the British Red Cross language. The Community Engagement term seemed to emerge from the CDAC 'Communicating with Communities CwC' language. At the same time IASC started using the term AAP but there was confusion between CwC and AAP, so OCHA came up with the new language of Community Engagement.

An informal Quality & Accountability meeting continues three times a year, with a rotating chair, which includes CHS Alliance, Sphere, ALNAP, Groupe URD, Ground Truth Solutions, Charter for Change, CDAC and others.

IOM and UNICEF were reported to have convened informal discussions on AAP, but there is no formal structure to bring together key people and organisations working on quality and accountability across NGOs and the UN. The IASC Task Team and OCHA were reported to have had a meeting in May 2018 to look at how to harmonise the various AAP initiatives and CHS Alliance was present at this meeting.

A forum to develop a collective voice across the different initiatives to ensure a more efficient and streamlined approach, guidance and common messaging may be worth exploring. The CHS Steering

Committee may wish to consider this issue of how to promote coordination and harmonisation on quality and accountability.

### **Impact summing up**

It is too early to assess what real difference the CHS Alliance support and services have made to 'building a culture of quality and accountability,' nevertheless it makes sense to consider developing proxy indicators to define and track impact over the coming years. In the meantime, broadening the membership, developing more of a field presence and coordinating better on quality and accountability will have a positive effect on the impact of the Alliance.

## **4.5 SUSTAINABILITY**

*Sustainability questions considered how the work of the CHS could be more sustainable and less reliant on donor funding.*

### **i) Sustainability of funding**

The Alliance will require ongoing donor funding for the foreseeable future. The income from membership fees and cost recovery from trainings and conferences should be the secure base, supplemented by institutional funding to cover the core costs of the Secretariat.

The Alliance are exploring all reasonable options to increase income within their overall mission, such as; additional training, consultancy support to members through deployments, a broader group of members generating additional membership fees and ongoing institutional funding as well as specific project funding. Apart from the usefulness of each of these activities, they would also serve to spread the financial risk.

### **ii) Existential questions about the sustainability of the CHS Alliance**

A couple of existential questions emerged about the longer term future of the Alliance.

Firstly, there was a suggestion from a variety of stakeholders that unless the Alliance can clarify its niche and offer (particularly around the verification framework and scheme) with a compelling vision, there is the possibility that its existence may be threatened in 5-10 years.

Secondly, one member suggested that now the standard is written and mature, it may be time to consider an exit strategy. This might look like the Alliance continuing to build an active constituency around the standard, ensuring it is integrated into other standards and then stepping away.

## **5. FINDINGS & RECOMMENDATIONS ON THE MERGER**

*Merger questions considered whether the HAP International and People In Aid merger in May 2016 achieved the intended outcomes (to make standards simpler, more efficient and more coherent) as well as exploring the benefits of the merger.*

### **5.1 Intended outcomes of the merger**

The merger of HAP International and People In Aid created a number of efficiencies, however at the same time HQAI was created, so in strict efficiency terms there has not been a reduction in the number of organisations.

Some members expressed an ongoing yearning for a single consolidated standards body and were disappointed that whilst the HAP International and People In Aid merger signalled the beginning of consolidation, they felt that the momentum had now stopped.

In terms of the standards architecture, most members thought the CHS had successfully simplified standards for field staff and this was more efficient, because members did not require two separate audit processes for two different standards. However, some felt that it was still complicated and wanted to continue looking for efficiencies with other standards bodies by considering further merger and consolidation.

One member felt that "overall we are in a better place with the merger between HAP International and People In Aid," whereas another was more reticent, suggesting that "it's too early to tell whether the merger outcomes have been achieved...people are still using the HAP and People In Aid language 3 years on."

## **5.2 Merger delays**

The merger of HAP International and People In Aid and the establishment of a new organisation took much longer than anticipated. There was some messiness at the beginning and the detailed finalising of internal controls and proper governance structures took up a significant amount of the Executive Directors and Boards time. People In Aid was finally struck off the UK Companies House register on 8th July 2018 and the company dissolved. The Secretariat were commended for absorbing the added burden and complexity of the merger.

One donor said “to the outside world it looked like the merger happened overnight.” Another donor said “the biggest achievement over the last three years was the successful merger of HAP International and People In Aid and the retention and ongoing commitment of members.”

## **5.3 Location of the Secretariat**

There are unlikely to have been significant savings realised on the physical office costs, because the Alliance is still maintaining two separate offices in Geneva and London. However, there are likely to have been savings made on staffing costs, given that there are ten fewer staff since the merger. A detailed cost analysis has not been completed.

The original merger statement on 17 Feb 2015 suggested that the Secretariat would be in two sites to maximise continuity in the transition period and ‘allowing for a possible future move out of Europe’. The current headquarters is still in Geneva, where it is recognised there is significant influence, with a small satellite office hosted at minimal cost by CAFOD in London since 28 June 2018.

Some mentioned the anomaly of maintaining dual offices in London and Geneva. There was a suggestion to close the London office on efficiency grounds and develop a more virtual business model with Geneva as a policy hub, or to consider closing the London office and instead open a satellite office in the global south, which links to the earlier point about making greater efforts to better engage southern members by having a more active presence in the global south.

The CHS Alliance may want to reconsider the longer term strategy concerning the location of the Secretariat and a presence in the global south.

## **5.4 Information and Communications Technology**

One of the practicalities of being a global membership organisation with a small secretariat, spread over several locations is the importance of ICT. Staff and members thought there was insufficient investment in ICT to make shared working fully viable. There has been no dedicated teleconferencing facilities over the last three years. The Secretariat has recognised the need to work on this area and have started improving IT systems, in order to improve the communications with members.

## **5.5 Internal communication**

Internal communication within the Secretariat has been a challenge, especially given the spread of locations between London and Geneva. Carrying out the Secretariat self-assessment and developing an improvement plan has helped the Secretariat to work out how to address these issues. The staff felt that internal communications could be improved with smarter meetings that are less procedural and more strategic. In addition, there could be stronger internal linkages between the policy and comms teams, to support more effective communications, such as taking photos at high profile events, regularly updating social media accounts, regularly refreshing the website and blogs.

## **Merger summing up**

The HAP International and People In Aid merger took longer than expected, but has achieved the intended outcomes, particularly in terms of simpler and more efficient standards. The original intention to consider a ‘possible future move out of Europe’ has not yet been explored due to the protracted and complex merger.

The merged organisation is still relatively new and sustained effort is needed on the improvement of IT systems and internal communication.

## 6. FINDINGS & RECOMMENDATION ON 2018-2021 STRATEGY

*Strategy questions provided a sense check and feedback loop on the new strategy.*

Between 2016-2018 there was no explicit CHS Alliance strategy, instead there was the agreed strategic mandate (Article 5 of CHS Alliance Statutes), operationalised by annual budgets and workplans agreed by the Board.

The strategy formulation included a number of consultations with staff, Board and members (July 2016 discussion with staff, September 2016 discussion with staff and Board, November 2016 discussion with the General Assembly, February 2017 discussion with staff). The final strategy was adopted by the Board in April 2017 and a 2018 Operational Plan and budget were agreed in September 2017.

Outside the Secretariat and Board and some donors there was very limited understanding of the content of the new 2018-2021 strategy, even though it was referenced in the December newsletter and available on the website.

In terms of process, a couple of Associate Members were surprised that the strategy had been developed and agreed *prior* to the external evaluation, thinking it would make more sense to do it the other way around.

Those people who were familiar with the strategy were generally pleased with the direction the CHS Alliance is heading in and appreciated the more focused objectives and activities. One member felt it was an 'ambitious strategy considering the number of staff in the Secretariat.'

### 6.1 Gaps in the strategy

In the light of the recent attention on safeguarding which has gained most publicity since after the strategy was published, the Alliance should take advantage of this momentum and revisit and refresh the Theory of Change and strategy, to highlight the changed context and to clarify how PSEA is mainstreamed into the CHS. The 2019 Operational Plan will also need to take account of increased interest in PSEA (for example, the original intention was to run 1 Investigation Workshop in 2018 and there have already been 6 so far this year).

The Theory of Change highlights a number of risks for the Alliance, such as 'multiplication of initiatives weakening the reach of CHS' and 'variable quality of self-assessments weakening the evidence base' however the corresponding risk management strategy developed for the Board has not yet been made available to members and should be included in the next project proposal to donors.

A couple of respondents made a broader point about the Alliance needing to be careful to avoid becoming to 'instrumentalised and bureaucratic' and instead to keep a focus on being visionary.

The feedback from respondents was that the strategy was fit for purpose but that the context and the 2019 Operational plan (being drafted in Aug 2018) needed to reflect the changed context.

There is an opportunity to re-launch the strategy with some strong communications around any refreshed content, making full use of the 2018 annual report, website, newsletters, phone calls with focal points and specific emails to contacts to promote the strategy.

**Recommendation 10 – The CHS Alliance should refresh the strategy to particularly take account of the current concerns on safeguarding and in turn relaunch the strategy with strong communications to promote key messages.**

Communications should include regular updates to members on progress against the success indicators.

### Strategy summing up

Members familiar with the strategy thought it was fit for purpose and were pleased with the direction the CHS Alliance is going. Given the safeguarding concerns in the sector, it makes sense to refresh the Theory of Change and objectives to reflect the changed context and relaunch the strategy following the mid-term review.



## 7. ADDITIONAL FINDINGS AND RECOMMENDATIONS

A number of additional areas were raised by respondents as part of the evaluation, including governance and membership.

### 7.1 Governance

The Interim Board included representatives from HAP International and People In Aid. The CHS Alliance Board is now into the second round of Board elections. The Board as well as sub-committees were reported to function well, with great improvements since the beginning and the Secretariat was commended for the excellent way it serviced the Board meetings.

#### a) Board size and frequency of meetings

The CHS Alliance Board is large (at 17 Board members) for an organisation the size of the Alliance. Servicing the Board and sub-committees imposes a disproportionate burden on the Secretariat.

One Board member suggested there needed to be a review of the frequency, location and type of meetings to lessen the burden of board meetings and increase their effectiveness, with more and shorter online meetings, with just one annual face to face Board meeting.

#### b) Board composition

A couple of Board members suggested having nominated groups on the Board, to encourage a plurality of Board membership, so that the Board avoids becoming too 'parochial' or 'lopsided' – this could involve having a certain number of seats for certain categories of members such as; local organisations, International NGO's operational, International NGO's partner based, UN, Red Cross & Red Crescent movement, Governments/Donors – to build on the guidance already provided in Article 21 of the Statutes.

**Recommendation 11 - The Board should consider a mechanism for ensuring a greater plurality of Board membership, such as a certain number of people from a representative range of nominated groups on the Board.**

#### c) General Assembly

Offering the option to attend the last General Assembly on-line was appreciated by members, particularly those who could not afford to attend in person.

PHOTO right is the November 2016 General Assembly meeting.



### 7.2 CHS Alliance Membership

#### a) Engagement of members

The Alliance needs to continue to proactively engage with members. There was a sense from some that there was strong engagement at the launch of the CHS, but that engagement with members had tailed off. A couple of members were concerned that the engagement was more one way, with the Secretariat wanting lots of information from members but not much coming back the other way in terms of advice and resources and feedback on the self-assessment reports.

Having said that, The Secretariat team were widely praised for being responsive and supportive to members, especially given the limited resources.

Members appreciated visits from the Secretariat staff and some felt that even more could be done in terms of being visible at members headquarters and giving presentations on the CHS to senior leadership.

Recognising that the Secretariat needed to improve engagement with members an initiative was launched last Autumn to allocate fifteen members per Secretariat staff to act as the main contact and liaison, with a drive to phone/skype members from March 2018. The initiative had a mixed response, with some appreciating it and others having no idea who the link person was, although that may be because the Evaluator was not talking to the member focal point.

#### **b) Secretariat as a resource and hub to members**

A number of members would like to see the Secretariat evolve to become more of a resource and a hub to members, with a shift in emphasis from the Secretariat as the lead to members as the catalyst. In this model, additional capacity for research and peer support and advocacy could come from higher capacity members.

Recent examples of members taking initiative and being the catalyst include:

- SCIAF and OXFAM promoting the CHS with the Scottish Government who have now included membership of the CHS Alliance as a criteria for accessing the Scottish Government Humanitarian Emergency Fund.
- German NGOs forming a Working Group on the CHS, chaired by Johanniter, with the Secretariat occasionally channelling information through the Chair to this group.
- Christian Aid promoting the CHS within the Grand Bargain workstream discussions, which was seen as effective because the CHS Alliance were regarded as having a vested interest and SCHR were the Conveners.

Peer support between members – more could be done by the Secretariat to broker relationships and connections between members for practical advice on implementation, to share guidelines and to pull together good practice from members. An example of this was ACTED being linked up with Concern Worldwide to provide advice on Complaints Handling Mechanisms. The alternative is that members will seek these resources and advice outside the Alliance, because as one member put it “we tend to get better resources and practical advice from ACT Alliance focal points than the Secretariat.”

**Recommendation 12 – the CHS Alliance Secretariat should continue to make a paradigm shift from being the initiator to being the catalyst and enabler, with members in the driving seat.**

#### **c) Communications**

Members appreciated the newsletters and member updates which are normally published every other month.

More effort could be invested in communications, given its importance in promoting the Alliance and the standard. Examples given of smart communications included using multiple channels, slick newsletters that bring data to life, Zoom conferencing, regular feedback to members, maximising the use of existing platforms on accountability such as the IASC Task Team and ALNAP, strong and easily digestible messaging to members and donors on the Alliance strategy and key workstreams.

Whilst it is essential to promote the CHS, the challenge is that there may be a perception that the Alliance are promoting themselves and selling their services. The mitigation is to make an effort to reach people outside the membership, to promote the broader issues of ‘quality and accountability’ and ‘humanitarian standards,’ to promote the benefits of using the standard in clear and practical language and to promote the usefulness of all the verification tools.

A stronger External Relations person at Director level may be needed, with a journalistic background who could have more engagement with the media. Alternatively, to outsource this type of senior external relations support.

#### **d) Non members vs members**

The Alliance should find a way of acknowledging and supporting agencies who endorse the CHS but do not wish to be members – as one non-member put it ‘they don’t need to push everyone through the gate of membership and verification.’ Having said that the value of membership to the Alliance is that it adds legitimacy and critical mass to their endeavour to promote the standard.

## **8. Conclusion**

Three years on from the formation of the Interim Governing Board in Nairobi in June 2015, the CHS Alliance has successfully established itself as a leading quality and accountability initiative. It has consolidated its membership and is providing a range of valuable services to members and beyond.

There are a number of threats to the Alliance’s existence as well as huge opportunities to grow and have wider influence across the sector.

There are many learnings emerging from the evaluation which will need to be reflected on and addressed as part of the evolution of the Alliance.

## **8.1 CHS Alliance's performance against its core objectives**

Most respondents felt the Alliance was very relevant. In order to remain relevant, the Alliance needs to make a compelling offer to members as well as working harder to be more visible. The positioning and relevance of the Alliance needs to be clarified in relation to HQAI and Sphere, and it makes sense for CHS Alliance to encourage alternative third-party verification options for their members.

The CHS verification scheme was valued by members and even though self-assessment is a time-consuming process, most felt it was worthwhile. A number of areas were identified for improvement, which the Secretariat is aware of, such as further guidance on the scoring grid and more support to members working through partners.

Trainings were appreciated by members and others, although the measuring effectiveness could be developed. PSEA training and resources were particularly commended. Training improvements were suggested in terms of a broader global reach, further development of the certified trainer scheme, further exploration of joint and integrated training and the expansion of on-line training.

People management aspects were seen as effective. The Core Humanitarian Competency Framework was particularly highlighted. Members found the HHR Conferences valuable, especially for networking, but given the questions about the cost and impact it makes sense to shift the emphasis to learning events.

Policy and advocacy are bearing fruit and there are some notable successes although there was a concern that the policy work is not strategic enough. There are a number of gaps where more effort will be required in order for the Alliance and the standard to have more visibility, particularly focusing on; smaller national NGO's, UN agencies, donor governments, CEO's of larger agencies and even the corporate sector. In terms of learning, further work is needed to develop a well moderated Community of Practice.

The CHS Alliance has sought to spread financial risk across a range of income streams which will need to be maintained and further maximised, nevertheless the CHS Alliance will require ongoing donor funding for the foreseeable future. The Secretariat is lean and therefore there is limited ability to stretch into new activities, such as additional training or deployments. Programme outputs were reported to be on track and on budget.

It is too early to assess what real difference the CHS Alliance support and services have made to 'building a culture of quality and accountability,' nevertheless it makes sense to consider developing proxy indicators to define and track impact over the coming years. In the meantime, broadening the membership, developing more of a field presence and coordinating better on quality and accountability will have a positive effect on the impact of the Alliance.

## **8.2 Outcome and benefits of the HAP & People In Aid merger in 2015/16**

The HAP International and People In Aid merger took longer than expected, but has achieved the intended outcomes, particularly in terms of simpler and more efficient standards. Some savings have been realised in terms of staffing costs. The original intention to consider a 'possible future move out of Europe' has not yet been explored due to the protracted and complex merger.

The merged organisation is still relatively new and sustained effort is needed on the improvement of IT systems and internal communication.

## **8.3 Feedback loop on the 2018-2021 strategy**

Members familiar with the strategy thought it was fit for purpose and were pleased with the direction the CHS Alliance is going. Given the safeguarding concerns in the sector, it makes sense to refresh the Theory of Change and objectives to reflect the changed context and relaunch the strategy following the mid-term review.

## **8.4 Additional Findings related to governance and membership**

The Board and sub-committees were reported to be functioning well. Some governance issues were raised in terms of the Board size, frequency of meetings and Board composition, with a suggestion by two members to encourage a greater plurality of Board membership.

Engagement with members requires ongoing proactivity. The Secretariat was widely appreciated for being responsive and supportive to members and they should continue to shift from being the initiator to seeing themselves as a resource and hub to members. Increased effort is needed on communications, both with members and more widely.

-END-

## ANNEX 5 – DRAFT MANAGEMENT RESPONSE MATRIX

Evaluation Recommendations	CHS Alliance opinion on the recommendation e.g. accept / partially accept / reject	CHS Alliance actions to be taken to address the recommendation, by whom and when.
<b>CHS Verification Framework and Scheme</b>		
Recommendation 1 – In order to demonstrate the commitment of certified agencies to the CHS, the CHS Alliance should explore the use of a CHS kitemark for certified agencies, rather than the current HQAI kitemark.	Partially accepted as the CHS Alliance is one of three copyright holders of the CHS. It is the sole copyright holder of the CHS verification scheme	Membership and nominations committee and Board. First quarter 2019
Recommendation 2 – the CHS Alliance should explore a broader range of accredited organisations able to offer third party verification options.	Accepted	Board discussion Sept 2018 -
Recommendation 3 – The CHS Alliance Secretariat should provide more guidance to organisations working through partners on how to conduct the CHS self-assessment.	Accepted	Included in Operational plan 2019
<b>CHS Alliance Services</b>		
Recommendation 4 – the CHS Alliance should clarify with the CHS Steering Group the authorisation and quality assurance process for approving translations of the CHS and supporting tools, as well as updating the CHS Translation Guidelines.	Accepted	On going discussion with CHS Management Group
Recommendation 5 – the CHS Alliance should encourage the CHS Steering Committee to consider how to broaden the reach of trainings into Asia, the Pacific and the Middle East, as well as targeting trainings into current humanitarian settings.	Accepted	On going discussion with CHS Management Group and CSH Steering Committee
Recommendation 6 – in the short term, the CHS Alliance should start summarising feedback data from training courses into concise training reports, to more systematically track the outcome of trainings and the quality of training events. In the medium term, the CHS Alliance should undertake a formal and systematic review of the quality and utility of trainings and ensure the curriculum and teaching methods are regularly updated by subject matter experts.	Accepted	Membership services operational plan 2019.
Recommendation 7 – the CHS Alliance should work with the CHS Steering Committee to systematically track CHS commitments from donors, since this information is important for advocacy.	Accepted	On going CHS Alliance and CHS management Group
Recommendation 8 – the CHS Alliance should build on the Strategy and 2018 Operational Plan to develop further advocacy and policy objectives, in order to give clear direction on who to engage with and how the Alliance wants key decision-makers in the sector to move on quality and accountability	Accepted	Operational plan 2019,

(for example; lobbying the UN and donors, which new members to seek after, key messaging on the importance and value of quality and accountability for members themselves to use to do their own advocacy and influencing, key messaging for donors themselves to use at multilateral level, clear 'policy asks'). The results of the engagement should be evaluated on a regular basis.		Executive director, head of policy, Board members, advocacy messages.
Recommendation 9 – the CHS Alliance should invest in the Resource Area on the website and turn this into a well moderated Community of Practice for accountability focal points, with key tools made widely and easily available to the whole sector.	Partially accepted, recognising the focus is the membership	Revision of webpage planned for 2018-2019 with an improved member area.
<b>Strategy</b>		
Recommendation 10 – The CHS Alliance should refresh the strategy to particularly take account of the current concerns on safeguarding and in turn relaunch the strategy with strong communications to promote key messages.	Accepted	Mid strategy review in April/May 2019 Operational plan 2019 already takes into account PSEA and safeguarding.
<b>Governance</b>		
Recommendation 11 - The Board should consider a mechanism for ensuring a greater plurality of Board membership, such as a certain number of people from a representative range of nominated groups on the Board.		For further discussion with the Board Membership and Nomination Committee
<b>Membership</b>		
Recommendation 12 – the CHS Alliance Secretariat should continue to make a paradigm shift from being the initiator to being the catalyst and enabler, with members in the driving seat.	Accepted	On going- Learning event Nov 2018 Support to members Peer to peer support Member of the month