CHS Tracker online platform phase 2 – Peer learning functionalities

Concept note – June 2023

What is the CHS Alliance?

The CHS Alliance is a global alliance of humanitarian and development organisations committed to making aid work better for people. We believe organisations deliver higher quality, more effective aid when they are accountable to the people they serve. Together, we are a movement to strengthen accountability and to put people affected by crisis at the heart of what we do by implementing the Core Humanitarian Standard (CHS).

What is the CHS, the CHS Verification Scheme and the CHS Tracker?

The Core Humanitarian Standard on Quality and Accountability (CHS) is a globally recognised tool to help organisations improve the quality and effectiveness of aid. The CHS has been designed with measurability in mind – allowing organisations to see the extent to which they meet the Standard, and identifying areas that need improvement.

The CHS Alliance Verification Scheme offers different approaches to verifying the degree to which an organisation is implementing the CHS in its work. The three current verification options include CHS Self-Assessment, undertaken with support from the CHS Alliance, and Independent Verification and Certification, which are conducted by a third-party auditor. The different options have been developed in acknowledgement of the variety of aid organisations operating in the sector, as well as the different stages they may be at in their journeys to meet the CHS Nine Commitments.

All verification options use the 62 indicators outlined in the CHS Verification Framework and allow organisations to capture useful data and identify areas of strengths and weaknesses. The process of verification, or the overall verification journey, is captured in the **CHS Tracker**, an online platform allowing organisations to take the lead in their CHS Self-Assessment, with functionality expected in a number of areas to foster greater interconnectedness and peer learning between organisations undertaking verification.

Project introduction

In 2023, the CHS Alliance launched its CHS Tracker, the product of the first phase of the CHS online platform development. The CHS Tracker enables organisations to conduct a CHS Self-Assessment online, using surveys to consult different groups of stakeholders. Organisations are enabled to progress their Self-Assessment journey through the platform, to collect the information they need, and see the results. They are also able to develop reports and improvement plans, which they submit to the CHS Alliance for validation.

Overall aim and key functionalities of phase 2

The current project aims to build on phase 1 by adding functionalities beyond the CHS Self-Assessment. Once these functionalities are online, the CHS Alliance aims to further facilitate and support the improvement

journey of verified organisations by allowing them to access resources and capacity, network and learn from peers in the sector.

These functionalities will be available for CHS Alliance members only, and focus on:

1. **Access to CHS Exchange spaces** where organisations will be able to:
   a. Participate in groups / Communities of Practice created by the CHS Alliance on topics of importance for the CHS and its application in different response contexts (e.g., AAP, PSEAH, People Management)
   b. Communicate with other member organisations using the platform, bilaterally or in groups, to initiate peer learning and advice on dedicated topics of interest. These ad-hoc peer groups will be "living" for as long as they are used by the organisations.

2. **Access to repository of good practice, tools and guidance** shared by organisations using the platform. Many of these examples of good practice, tools and guidance already exist and will continue to be sourced from organisations undertaking verification. The repository will be organised according to stage in the verification journey, and sub-divided into commitments and indicators of the CHS. It is expected that the repository will ensure highly accessible resources to a wide range of organisations at different stages of applying the CHS.

How we expect it to be working

Below is a series of considerations describing how we envision the two functionalities to work. The selected service provider will be required to implement all of these, or flag to the CHS Alliance if some elements should be left out of the current scope of the project:

For both:

1. The two modules will be built on the same community cloud site as the organisation portal deployed from our Salesforce, where the Self-Assessment tools are already available to organisations.
2. The two modules will be restricted to members of the CHS Alliance only – using the type of license each organisation has received from the CHS Alliance when they started accessing the platform (this type can be changed by the administrator if an organisation changes its membership status).
   o Some organisations will require multiple access. At the moment, each organisation has one login only, hence this needs to be explored and resolved.

The Exchange spaces will offer the following features:
1. Both CHS Alliance administrators AND user organisations will have the ability to create groups to exchange and discuss identified topics (by their choice). The topic is made clear through the group title and a short description made by the creator. CHS Alliance will not be leading all the discussions, however, it will maintain its facilitator role as owner of the space and have a moderation role in all the groups, to ensure relevance to topic and respect for the established code of conduct.
2. Within the groups, members can chat, and upload documents, which then become accessible to others within the group for as long as the group exists.
3. The creator of the group will decide on the level of privacy of the group, including whether it will be open or restricted to some selected invitees. Any invitee can accept or decline the invitation and can at any point in time leave the group.
4. There is no limit on the number of groups that can be created, and a user can decide to join as many as they want.

5. All groups are listed and visible on the main page of the exchange space, including the closed groups.
6. A group that is dormant for more than three months will be automatically archived, with its creator notified prior to this action. Any archived group can be retrieved by its creator later.
7. When creating a new group, some key information should be captured that will "define" the group:
    a. Topic
    b. Commitments of the CHS it will relate to (it can be several)
    c. Language in which the discussions will happen.
    d. Scope – global, regional, country level or none of these categories
    e. Privacy & publicity (open or restricted group, and whether it should appear on the portal for those that are not in it)

The repository of good practice, tools and guidance:
1. Good practice, tools and guidance will primarily be taken from two sources:
    a. **The documentary review and partnership agreement review in the CHS Self-Assessment process**: Through the CHS Self-Assessment surveys, organisations have the possibility to upload practice/tools/guidance they feel comfortable sharing with other members of the Alliance. These documents should be linked to a specific stage in the verification journey and to CHS commitments and – if possible – to indicators. It would be ideal if these documents could be automatically uploaded to the repository during the Self-Assessment process[1], with a validation process by CHS Alliance to ensure relevance and accuracy of content, as well as tagging of the documents according to set criteria:
        i. Stage in verification journey
        ii. Relevance to which CHS Commitment and what indicator(s)
        iii. Type of the author-organisation
        iv. Country of the author-organisation
        v. Language
        vi. Year of development

    b. **Organisations should be able to upload their tools directly to the repository, outside the framework of the CHS Self-Assessment process**. When organisations do so, the same process of upload for validation and tagging by the CHS Alliance secretariat should be ensured before content is made available to users of the repository.
2. Once in the repository, the practice, tools and guidance should appear with the mention of the organisation that created them, and the tags applied by the CHS Alliance, as listed above.

Budget and timeline

CHS Alliance will solicit offers from service providers, all in line with the following guidance:
- The quote should not exceed forty thousand Swiss Francs.
- The project timeline is from July until the end of the 2023 calendar year.

All interested stakeholders are welcome to express their interest by sending a quote to verification@chsalliance.org, or request a meeting to discuss and understand better the needs and requirements.

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[1] Within the limitation of storage that needs to be clarified.