Start-up Workshop Building Blocks

The start-up workshop **building blocks help planners organize and sequence a start-up workshop agenda** and identify the appropriate participants for specific sessions. The start-up workshop can be a tiered process, moving from high-level orientation for a broad group of project stakeholders, including senior management, to sessions where staff directly involved in implementation engage with the details and requirements of the project, to action planning. The diagram on Page 2 highlights the topics that form the basic building blocks for an effective start-up workshop and illustrates the sequencing of and connections between topics.

This document includes **sample start-up workshop agendas** for two project scenarios:

- **Scenario 1**: Smaller, discretionary-funded project with existing partner(s)
- **Scenario 2**: Complex, external-donor-funded project with multiple partners (new donor and/or new partners)

The sample agendas show how the content of each start-up workshop differs, depending on factors including:

- Project complexity
- The number of project staff that were involved in the project design process
- The number of partners and their experience working with CRS and any project donor
- The timing of the project detailed implementation plan (DIP) workshop

Use this document as a starting point in your workshop planning, in conjunction with CRS' *Guidance on Designing and Delivering Effective Training Events*. Adjust the sample agenda content to suit your project needs, and always develop a facilitation guide to make sure the start-up workshop is not a series of PowerPoint presentations, but rather an opportunity for participants to engage in discussion, reflection, analysis, and action planning.

For smaller projects, the start-up workshop may last 1 day and immediately precede DIP development. For very complex projects, the workshop might last 3 to 5 days, with the DIP workshop scheduled later.

Consortium projects: If CRS is leading a consortium, a half-day "CAFE workshop" following the outline in the *Consortium Alignment Framework for Excellence (CAFE)* document, may also be appropriate.

Tier 3: Looking Ahead

Participants: CRS and partner project team members

Session objectives:
1) To keep start-up moving forward by reviewing and updating specific next steps in project start-up.
2) To prepare for DIP development.

Tier 2: Key Details

Participants: A more focused group of CRS and partner staff with implementation responsibilities; participants for specific sessions determined by topic (operations, MEAL, programming approach). Participants will consist of CRS and partner project team members, including operations leads (finance, procurement/supply chain management/other operations, human resources) and technical program staff supporting project implementation.

Session objective: To deepen project team members' understanding of project design details; implementation and compliance requirements and processes, including who, when and how; team roles and responsibilities; and support needs and resources. (*see also* Standard 10, key action 2).

Tier 1: The Big Picture

Participants: All CRS and partner leadership and implementation staff, including CRS and partner directors or other senior management; programming and operations staff working on the project; other implementing actors as applicable.

Session objectives:
1) To orient partner leadership and project team members (especially new staff) to the design of the project, implementation and compliance requirements, and project roles, responsibilities, and coordination.
2) To establish/strengthen relationships and rapport among CRS and partner staff/consortium members who will work together to implement the project (*see the consortium governance half-day workshop block, if applicable*).

Start-up Workshop Outline

STANDARD 7, KEY ACTION 2

TIER 1: The Big Picture

CRS and partner senior management, all CRS and partner project staff, and additional programming and operations technical specialists (as needed)

- Workshop opening
- Project background and design overview
- Project roles, coordination and governance
- Operational processes and parameters
- Agreement requirements and compliance issues
- Half-day workshop for consortium projects

TIER 2: Key Details

Project staff, with additional technical specialists (as needed)

- Project design details (including validation as appropriate)
- Project FCRM
- Project MEAL
- Project human resource management
- Project procurement and supply chain management
- Project financial management
- Project ICT4D

TIER 3: Looking Ahead

Project staff only (programming, finance, and other operations)

- Review of early start-up activities

Scenarios 1 and 2 if a joint start-up/DIP workshop is planned

- S7 DIP workshop

OR

- Programming action planning
- Operations action planning

Scenario 2 if a separate DIP workshop is planned

- Overall next steps and workshop closure

Scenario 1: Sample Start-up Workshop Agenda

SMALLER, DISCRETIONARY-FUNDED PROJECT WITH EXISTING PARTNER(S)

The sample agenda below is organized using the start-up workshop tiers and blocks summarized on Page 2. The agenda is designed to include project validation as part of the "Key Details" portion of the workshop. We have provided an indicative duration for each session; **adjust the schedule to your project context**. Use the topics and content outline to develop a more detailed start-up workshop facilitation guide. **Remember to use appropriate adult learning techniques to facilitate participants' active participation and engagement with the content.**

TIER 1: THE BIG PICTURE – CRS and partner senior management, all CRS and partner project staff, plus any additional programming and operations technical specialists (as needed)

***Note**: The "Big Picture" portion of the start-up workshop focuses on providing an overview of the final approved project at a level of detail appropriate for CRS and partner senior management. Project staff will analyze the project in greater depth in the "Key Details" portion of the start-up workshop.*

The objective of the "Big Picture" session is to ensure that senior management know the basics of the project, and the roles and responsibilities of each organization, so that they can support their teams with effective and timely start-up, as well as effective management of project implementation and compliance requirements. Organizing this session with the participation of all partners helps promote transparency and ensures that all staff and senior management receive the same information and can discuss questions together.

Duration	Topic (with content outline)
10-15 minutes	**Workshop opening** • Welcome, and introductions (as needed) • Start-up workshop objectives and agenda • Situating the workshop in the wider project start-up process
30-90 minutes	**Project background and design overview** • Brief review of project origins • Summary of problem/situation analysis • Geographic targeting • Participants • Results framework, theory of change, key activities, major benchmarks • Sustainability strategies • Project funding levels • High-level review of major project risks and risk management strategies* **Note: Highlight to senior management that the project team will review project risks, issues, opportunities and management strategies in more detail during the project validation process built into the "Key Details" portion of the start-up workshop (see below).*
30-90 minutes	**Project roles, coordination, and governance** • Project organizational chart, roles and responsibilities • Project governance and decision-making • Working norms • Internal project coordination and communication • External coordination and communication with host government, and other actors (including a review of any draft project plan to engage potential donors) • Mutual accountability • Overview of project plans for CRS and partner capacity strengthening *If partner senior management is new, consider including the following:* • Commitment to participant accountability and CRS' MEAL Policies and Procedures (high-level overview)
15-45 minutes	**Operational processes and parameters AND agreement requirements and compliance issues** • Security issues and protocols • Brief review of project financial management, human resources, and project procurement and supply chain management processes and expectations • Brief review of CRS-partner sub-agreements and compliance issues (including Code of Conduct, fraud, audits)
10-15 minutes	**"The Big Picture" wrap-up** • Review of any key steps for follow-up before wrapping up with senior management

Total time Tier 1: 1 hour and 25 minutes - 4 hours and 15 minutes
Note: Time required will differ depending on the number and past engagement of partner staff, e.g. plan for less than 2 hours with senior management for a project with a single partner where partner leadership was involved in project design, and 4+ hours for a project with multiple partners.

TIER 2: KEY DETAILS – Project programming, finance and operations staff only, with additional technical staff as needed, e.g., if the project includes programming or operations issues that are relatively new for CRS and/or project staff (joint and programming staff-only sessions; joint sessions are noted with a ✚ symbol)	
Duration	**Topic (with content outline)**
3-5 hours Time will vary based on project complexity, operating context, number of participants, etc.	✚ **Joint session on project validation** **(all project programming staff, along with key operations and finance staff, plus additional technical and management staff, as needed).** See *Guidance for Project Design Validation and Adaptation* • Review of project operating context • Analysis of implications of the risks, opportunities, and issues identified during operating context review • Validation of the project theory of change and technical design* (taking into account the risk, issue and opportunity analysis), and identification of adaptations, as needed **Note: This includes a review of the project Proframe, as well as programmatic assumptions and risks.*
3-6 hours	**Project design details (programming staff)** In-depth orientation to/discussion of: • Project participant profiles and targeting • Specific programming technical issues, strategies, approaches, assessments needed, including additional discussion of any adjustments needed based on validation discussions • Related past experiences and lessons learned • Exit strategies • Sustainability plan • Programming technical assistance plans per the project proposal • Coordination on programming issues among partners (as applicable depending on number of partners and individual partner roles) **Project FCRM (programming staff)** • Donor, partner and agency requirements for FCRM (Safeguarding Policy and MEAL Policies and Procedures) • Scope of FCRM and selected channels • Staffing structure for FCRM (CRS and partner) • Plans for handover or close-out of FCRM *If there are many partner staff new to working with CRS, include the following:* • CRS Safeguarding Policy (detailed review) **Project MEAL (programming staff)** • Project MEAL plan (including indicators and targets) • Technical reporting requirements and formats • Preliminary discussions on participant accountability strategy, project learning agenda and strategy, and plan to develop project MEAL operating manual • CRS' Responsible Data Values and Principles and the responsibility of all project staff to safeguard participants' personal data (see the Responsible Data page on MyCRS) *If there are many partner staff new to working with CRS, include the following:* • CRS MEAL Policies and Procedures (detailed review)

	Joint session on project operations issues (programming, finance and other operations staff, with additional operations technical staff, as needed)
1-3 hours	**Project human resource management** • Detailed review of project staffing structure • Staff job descriptions and recruitment • Managing and communicating about project HR issues **Financial management** • Project budgeting, budget structure and assumptions • Financial reporting expectations, requirements, and formats • Managing budget line item flexibility • Brief review of segregation of duties and disallowed costs *Additional topics as needed, depending on partner staff familiarity with CRS processes and requirements* • Sub-recipient financial management assessment and follow-up process • Petty cash • Managing bank accounts **Procurement and supply chain management** *Include the following if there are many project staff with little experience of CRS and donor requirements, or cover as a brief refresher for more experienced staff:* • Purchasing/procurement formats and procedures (including purchase requisitions, purchase orders, bid comparisons) • Required documentation for purchasing goods and services • Managing procurement of items of greater than $1,000 in value • Supply chain management forecasting and planning, including review of project procurement plan *Additional topics as needed, depending on project supply chain management components* • Supply chain management compliance issues, formats and procedures, including monitoring procedures and reporting formats • Managing and communicating about project supply chain management issues **Project ICT4D (if applicable based on project design)** • Overview of project ICT4D plans, including plans for responsible data management (see the Responsible Data page on MyCRS for resources) • Procurement, management, and deployment of ICT4D equipment • ICT4D roll-out, including technical support needs and plans
Total time Tier 2: 7-14 hours, including project validation	

TIER 3: LOOKING AHEAD – Project staff (programming, finance, human resources, procurement/supply chain management, and other operations)	
Duration	**Topic (with content outline)**
1-2 hours	**Joint review of early start-up activities (programming, finance, human resources, procurement/supply chain management, and other operations staff)** • Review of and updates to the project early start-up plan, including roles and responsibilities • Identification of priority early start-up actions requiring immediate attention
Total time Tier 3: 1-2 hours, **followed by DIP workshop** (see Standard 7, key action 3)	

Scenario 2: Sample Start-up Workshop Agenda

COMPLEX, EXTERNAL-DONOR-FUNDED PROJECT WITH MULTIPLE PARTNERS (NEW DONOR AND/OR NEW PARTNERS)

The agenda below is organized by the start-up workshop tiers described on Page 2. The duration is suggested and will vary based on the size of the CRS and partner group, how well the organizations know each other, and project complexity. Keep in mind that the start-up workshop is a key opportunity to build or strengthen relationships among organizations and individuals who will need to work together throughout the project.

For complex projects, the project team will likely have organized an earlier project validation session to review the project operating context and key project design decisions (see Standard 7, key action 1 for guidance). The start-up workshop builds on this and other early start-up discussions between CRS and partners.

Adjust the schedule to your project context, and use the topics and content outline to develop a more detailed start-up workshop facilitation guide. The Example DREAMS Start-up Workshop Agendas (located under "Other Resources" for Standard 7, key action 2 in *Compass*) may be useful references for developing your start-up workshop agenda, particularly for Tier 2 parallel sessions. **Remember to use appropriate adult learning techniques to facilitate participants' active engagement with the start-up workshop content.**

For projects where CRS leads a consortium, the agenda below may follow a half-day consortium governance workshop. See the *Consortium Alliance Framework for Excellence (CAFE)* manual.

Note: There are two end-point options for the Scenario 2 start-up workshop, depending on the project team's plan for detailed implementation plan (DIP) development. For start-up workshops organized separately from the project DIP workshop, the start-up workshop concludes with action planning and formal workshop close. For projects where the team organizes the DIP workshop immediately after the start-up workshop, the start-up workshop ends with a review of the project early start-up plan. See below for a sample agenda for each of these two options.

TIER 1: THE BIG PICTURE – CRS and partner senior management, all CRS and partner project staff, plus any additional programming and operations technical specialists (as needed) While the start-up workshop may be the first opportunity to bring all partners together, it builds on early start-up discussions between CRS and partners. ***Note:*** *The "Big Picture" portion of the start-up workshop focuses on providing an overview of the final approved project at a level of detail appropriate for CRS and partner senior management. Project staff will analyze the project in greater depth in the "Key Details" portion of the start-up workshop.* *The objective of the "Big Picture" session is to ensure that senior management know the basics of the project, and the roles and responsibilities of each organization, so that they can support their teams with effective and timely start-up, as well as effective management of project implementation and compliance requirements. Organizing this session with the participation of all partners helps promote transparency and ensures that all staff and senior management receive the same information and can discuss questions together.*	
Duration	**Topic (with content outline)**
30-45 minutes	**Workshop opening** • Welcome and introductions • Start-up workshop objectives and agenda • Situating the workshop in the wider project start-up process
1.5 - 2.5 hours	**Project background and design overview** • Overview of donor • Donor priorities for the project (as articulated in the RFA/Call for Proposals and any other communication, including donor feedback on the proposal) • Review of CRS and partner interest in pursuing the funding opportunity • Summary of problem/situation analysis • Project theory of change and results framework • Key activities and major benchmarks • Geographic targeting • Participants • Overall activities timeline • Sustainability strategies • Project funding levels • High-level review of major project risks and risk management strategies
1-2 hours	**Project roles, coordination, and governance** • CRS' approach to partnership (and consortium leadership, if applicable) • Commitment to participant accountability and CRS' MEAL Policies and Procedures (high-level overview) *CRS and individual partner/consortium member roles* • Project organizational chart, roles and responsibilities • Project governance and decision making • Mutual accountability • Working norms • Internal project coordination and communication • External coordination and communication with donors, host government, and other actors (including a review of the project communications plan; any project communications protocol; and any draft project donor engagement plan) • Overview of project plans for CRS and partner capacity strengthening
45 minutes - 1.5 hours	**Operational processes and parameters** • Security issues and protocols • High-level overview of financial management processes and expectations • High-level overview of project procurement and supply chain management processes and expectations • High-level overview of human resource expectations and plans (recruitment, contracts, etc.)
1-2 hours	**Agreement requirements and compliance issues** • CRS-partner sub-agreements and compliance issues (including Code of Conduct, fraud, audits) • Review of Award Management Deliverables Calendar and requirements (including reporting frequency) • High-level review of donor expectations and requirements (e.g. bank accounts, audits, prior approvals, line-item flexibility) • Donor communications protocols and requirements, including any branding and marking requirements
15-30 minutes	**"The Big Picture" wrap-up** • Review of any key steps for follow-up before departure of senior management
Total time Tier 1: 5–9.5 hours	

<table>
<tr><th colspan="3">TIER 2: UNDERSTANDING THE DETAILS – Project and technical staff only, in joint and parallel sessions (joint sessions are noted with a “plus” + symbol)</th></tr>
<tr><th>Duration</th><th colspan="2">Topic (with content outline)</th></tr>
<tr><td rowspan="8">4-10 hours

During this block, programming and operations sessions (human resources management, financial management, procurement and supply chain management) would be held in parallel</td><td>Project design details
(programming staff)</td><td>Project human resource management
(human resources staff/other staff with HR responsibilities)</td></tr>
<tr><td rowspan="3">In-depth orientation to/discussion of:
• Full logframe (by sector leads as applicable)
• Key programmatic assumptions and detailed risks (review risk register)
• Project participant profiles and targeting
• Specific programming technical issues, strategies, approaches, assessments needed
• Related past experiences and lessons learned
• Exit strategies
• Sustainability plan
• Programming technical assistance plans and resources per the project proposal
• Coordination on programming issues among partners (as applicable depending on individual partner roles)</td><td>• Staff job descriptions and recruitment, including check-in on status of recruitment for any unfilled project positions
• Staff contracts (keeping in mind project close-out timing)
• Review of pertinent HR policies, e.g. protection from abuse and exploitation and reporting procedures, whistleblower (anti-corruption)
• Managing and communicating about project HR issues</td></tr>
<tr><td>Project procurement and supply chain management
(procurement/supply chain/other operations staff)</td></tr>
<tr><td>• Procurement and supply chain management compliance issues, formats and procedures, including monitoring procedures and reporting format
• Procurement and supply chain management internal project communications</td></tr>
<tr><td colspan="2">Project FCRM (programming staff)</td></tr>
<tr><td colspan="2">• Donor, partner and agency requirements for FCRM (Safeguarding Policy and MEAL Policies and Procedures)
• Scope of FCRM and selected channels
• Staffing structure for FCRM (CRS and partner)
• Plans for handover or close-out of FCRM</td></tr>
<tr><td>Project MEAL
(programming staff)</td><td>Project financial management
(finance staff)</td></tr>
<tr><td>• Project MEAL plan (including indicators and targets)
• Technical reporting requirements and formats
• Preliminary discussions on participant accountability strategy, project learning strategy, and plan to develop project MEAL operating manual
• CRS’ Responsible Data Values and Principles and the responsibility of all project staff to safeguard participants’ personal data (see the Responsible Data page on MyCRS)
If there are many partner staff new to working with CRS, include the following:
• CRS MEAL Policies and Procedures (detailed review)</td><td>• Sub-Recipient Financial Management assessment and follow-up process
• Petty cash
• Managing bank accounts</td></tr>
</table>

3-6 hours	**Joint session(s) on project operations issues (all - programming, finance, and other operations staff)** *You may choose to cover the content below in a series of joint sessions rather than a single block* **Human resource management** • Detailed review of project staffing structure • Staff effort reporting (timesheets) **Financial management** • Budgeting, budget structure and assumptions • Financial reporting expectations, requirements, and formats • Managing budget line item flexibility • Segregation of duties • Disallowed costs **Project ICT4D (if applicable based on project design)** • Overview of project ICT4D plans, including plans for responsible data management (see the Responsible Data page on MyCRS for resources) • Procurement, management, and deployment of ICT4D equipment • ICT4D roll-out, including technical support needs and plans **Procurement and supply chain management** • Purchasing/procurement formats and procedures (including purchase requisitions, purchase orders, bid comparisons) • Required documentation for purchasing goods and services • Managing procurement of items of greater than $1,000 in value • Supply chain management forecasting and planning, including review of project procurement plan
Total time Tier 2: 7-16 hours	

TIER 3: LOOKING AHEAD – Project staff (programming, finance, and other operations)

OPTION A: Standalone start-up workshop (DIP workshop scheduled for a later date)

Duration	Topic (with content outline)	
1-2 hours	**Joint review of early start-up activities (programming, finance, and other operations staff)** • Review of and updates to the project early start-up plan, including roles and responsibilities • Identification of priority early start-up actions requiring immediate attention (e.g., finalizing recruitment of staff who need to participate in DIP development)	
1-3 hours	**Programming action planning (programming staff)** • Finalization of materials, plans and individual organizational roles and responsibilities for any project launch event(s) • Action planning around early start-up programming actions requiring immediate attention and other programming issues identified during earlier sessions • Identification of steps each organization can take to prepare programming inputs for DIP development	**Operations action planning (operations staff, including finance)** • Action planning around early start-up operations actions requiring immediate attention and other operations issues identified during earlier sessions • Identification of steps each organization can take to prepare operations inputs for DIP development
30 minutes - 1 hour	**Overall next steps and workshop closure (all staff)** • Brief presentation of programming and operations action plans • Recap of decisions, agreements, and next steps and responsibilities in the start-up process	
Total time Tier 3: 3-6 hours		

OPTION B: Start-up workshop followed immediately by DIP workshop

Duration	Topic (with content outline)
2-3 hours	**Joint review of early start-up activities (programming, finance, and other operations staff)** • Review of and updates to the project early start up plan, including roles and responsibilities • Identification of priority early start-up actions requiring immediate attention
Total time Tier 3: 2-3 hours, **followed by DIP workshop**	