UNHCR
The UN Refugee Agency

Regional Bureau for Europe

EUROPE REFUGEE-LED ORGANIZATION TOOLKIT 2025

Delivering on UNHCR's commitment to local leadership

Cover photo: Spain – Aminata Soucko, a gender-based violence survivor from Mali in West Africa and the founder of the Red Aminata association, helps out with Spanish lessons for refugee women at the association's office in Valencia, Spain, in October 2024. © UNHCR/Ébano Stories

INTRODUCTION / SUMMARY

Across Europe, UNHCR works hand in hand with refugee-led organizations (RLOs), supporting their efforts to provide protection and assistance to their communities, and to contribute concretely to the search for solutions, through a range of initiatives and programmes. These organizations are critical partners for UNHCR, as they facilitate participation in programmatic decisions by people with lived experience of forcible displacement and statelessness. Amplifying their voices and enabling their participation and leadership is a key element in sustainable responses and delivers on UNHCR's commitment to Accountability to Affected People (AAP).

This toolkit seeks to collect and present information and resources that support the critical work done by RLOs. Covering a wide range of topics related to the establishment, management, communications, and fundraising activities of RLOs, it provides tips and tools to help organizations that may be starting operations or seeking to scale up their delivery. This includes recognizing that RLO work is often carried out under sustained stress—both for communities and for the staff and volunteers supporting them—making well-being and safe, sustainable ways of working a practical part of organizational strengthening. Drawn from the work and experience of UNHCR operations across Europe, this guidance seeks to recognize and reinforce RLOs as strategic partners in delivering services and assistance, advocating for programs that meet urgent needs, and participating in the coordination of the broader response.

This toolkit is designed as a modular, flexible, and nonprescriptive resource to strengthen UNHCR's engagement with Refugee Led Organizations (RLOs) and other community based structures. Grounded in UNHCR's commitments to localization, community based protection, and accountability to affected people (AAP), it consolidates lessons learned from field operations, emerging practices within RLO networks, and standards drawn from interagency frameworks such as the IASC Localization Guidance, UN Community Engagement Guidelines, and the Core Humanitarian Standard.

Recognizing that no two RLOs are alike, the toolkit acknowledges the **diversity** of their:

- legal and registration status (formal NGOs, associations, informal groups, social enterprises)
- missions and thematic focus (protection, education, livelihoods, advocacy, GBV, health and mental health, disability inclusion, LGBTIQ+ rights, etc.)
- organizational structures and capacities
- operational realities and access constraints, including contexts of displacement, statelessness, and mixed-migration environments.

For this reason, the toolkit does not outline a "one size fits all" model, nor does it prescribe fixed pathways for partnership. Instead, it offers a menu of tools, methodologies, and adaptable approaches that can be selectively applied based on each organization's needs, aspirations, and stage of institutional development.

The purpose is to support UNHCR and partners in:

1. **Strengthening equitable partnerships with RLOs**

The toolkit promotes models of collaboration that reflect UNHCR's commitments to participation, trust-building, risk-sharing, and power-shifting, consistent with the Global Refugee Forum pledges on localization, and in line with UNHCR's Policy on Age, Gender and Diversity, and Community Based Protection (CBP).

2. **Enhancing the meaningful participation of refugees in decision-making**

Drawing from the UN's community led development principles, it supports approaches that place RLOs at the centre of assessment, programme design, implementation, monitoring, and advocacy, acknowledging their role as first responders and trusted actors embedded within their communities.

3. **Facilitating tailored capacity strengthening**

The toolkit provides guidance for co-designed capacity sharing, rather than top down capacity building, emphasizing mutual learning, complementarity, and sustainability. It encourages the identification of organizational priorities through participatory diagnostic tools, ensuring that support is relevant and demand driven.

4. **Enabling operational flexibility and contextual adaptation**

Given the diversity of displacement settings—urban, rural, camp, mixed movement, emergency, and protracted displacement—the toolkit supports context-sensitive adaptations. Users are encouraged to tailor tools based on available resources, partnership models, and the operational environment, including access restrictions or evolving protection risks. movement, emergency, and protracted displacement—the toolkit supports context-sensitive adaptations. Users are encouraged to tailor tools based on available resources, partnership models, and the operational environment, including access restrictions or evolving protection risks.

5. **Supporting safe, principled, and accountable engagement**

Aligned with UNHCR protection principles, the toolkit provides guidance for integrating PSEA, safeguarding, do-no-harm, and GBV risk mitigation, as well as mechanisms for accountability to affected people. It underscores the importance of ethical representation and inclusivity, ensuring that partnerships with RLOs uplift voices across age, gender, and diversity dimensions.

How the Toolkit should be used

- **Modular:** Each section can be used independently based on operational needs.
- **Adaptable:** Tools are templates—intended to be modified with RLOs, not applied unilaterally.
- **Complementary:** It builds on existing UNHCR guidance (CBP, AAP, Partnerships, PROMS, AGD, GBV, and Protection Cluster materials).
- **Practical:** It emphasizes actionable steps, field-tested tools, and examples from UNHCR's ongoing localization efforts.

- **Iterative:** It promotes continuous learning and updating as field practices evolve.

Each chapter contains therefore a blend of:

- **Practical tools and templates**
- Clear **explanations** of core concepts
- **Examples** from RLOs and partners in Europe
- **References** to existing UNHCR resources

Intended Audience

This toolkit was drafted for:

- RLOs at various stages of development, from informal initiatives to registered associations, composed of and serving diverse communities, including women, LGBTQI+, youth, older people, people with disabilities, and others
- UNHCR offices, NGOs, and local actors supporting RLOs through provision of funding, capacity-building, and operational partnership

The tools contained herein may also benefit community-based organizations (CBOs) looking to collaborate with RLOs or apply similar approaches grounded in community-based protection.

Beyond the toolkit

This toolkit is a beginning, not an end point. A starting point, not an exhaustive rulebook. It is designed to accompany RLOs, CBOs, and community groups on their own organizational journeys—offering foundational knowledge, practical tools, and adaptable guidance that can be used, modified, or set aside according to local realities. It provides structure and support, but cannot and does not replace specialized legal, financial, administrative, or operational expertise. Nor can it substitute the lived experience, creativity, or strategic priorities of refugee-led organizations themselves.

Because contexts vary widely—legislation, registration requirements, funding environments, political sensitivities, and community dynamics—some sections may require translation, contextualization, or alignment with national legal frameworks. This is not a flaw but a core feature of localization: tools must be shaped, re designed by those who use them, not imposed from outside.

In this spirit, the toolkit seeks to strengthen agency, not standardization. It encourages RLOs to reflect on what works for them, adapt what does not, and rely on their own expertise, networks, and values. RLOs are therefore encouraged to:

- Customize tools, templates, and checklists so they reflect their organizational culture, governance model, and operational reality.
- Build on existing community knowledge and local practices, recognizing that many RLOs already have strong systems, informal mechanisms, and Indigenous ways of organizing that do not need to be replaced.
- Combine these materials with peer support, mentorship, community consultations, and partnership opportunities that strengthen collective leadership and shared learning.

The toolkit also recognizes that localization is relational. It depends not only on RLO initiative but also on the enabling environment created by UNHCR, host governments, and partners. Therefore, **depending on the context, UNHCR country offices may offer:**

- **Technical guidance on protection, partnerships, project design, or compliance.**
- **Tailored capacity sharing programmes, codeveloped with RLOs and rooted in mutual learning.**
- **Networking opportunities that connect RLOs with other organizations, local authorities, donors, coordination mechanisms, and community structures.**
- **Funding pathways, including support to engage with pooled funds, microgrants, community led initiatives, and other financing opportunities where feasible.**

Beyond country-level support, UNHCR also organizes regional and global initiatives that promote connection, growth, visibility, and collaboration among refugee led organizations, community-based groups, and their constituencies. These forums help amplify refugee leadership, reduce isolation, and strengthen collective advocacy.
For up to date information on available opportunities in your location—including services, programmes, and community networks—RLOs are encouraged to visit help.unhcr.org.

TOOLKIT STRUCTURE AND CHAPTERS

The toolkit is divided into seven stand-alone chapters. Each addresses a key area of organizational development and includes content sections, practical tools, and real-world examples, as described below:

Chapter 1: Building organizational capacity and leadership development
Governance, operations, and leadership skills for inclusive, accountable organizations.
Tools: Governance checklist, leadership self-assessment, meeting templates

Chapter 2: Strengthening community engagement and inclusive collaboration
Community-based protection, AGD approaches, participatory methods, and trust-building.
Tools: Stakeholder mapping, DEI checklist, community engagement framework

Chapter 3: Maximizing funding opportunities with UNHCR and other entities
Funding strategies, financial planning, reporting, and UNHCR partnership guidance.
Tools: Funding roadmap, budgeting templates, reporting tool

Chapter 4: Enhancing communication, digital skills, and outreach
Branding, storytelling, social media, public engagement, and digital presence.
Tools: Social media guide, branding tips, public speaking CV

Chapter 5: Ethical standards and code of conduct
Core values, integrity, accountability, and humanitarian principles.
Tools: Code of Conduct templates, ethics implementation checklist

Chapter 6: Prevention of Sexual exploitation and Abuse (PSEA)
PSEA standards, risk mitigation, reporting mechanisms, and partner requirements.
Tools: PSEA core standards toolkit, UN Partner Portal navigation guide

Chapter 7: Capacity building and volunteer management
Volunteer systems, training frameworks, and access to learning resources.
Tools: Training CV, volunteer dos and don'ts, resource tracker.

The toolkit is part of a broader ongoing effort to support local leadership in refugee response and may be updated as new tools, lessons, and partnerships evolve. RLOs and UNHCR offices are invited to adapt and build upon it to meet the real needs of communities across Europe.

MODULE 1: GOVERNANCE

Refugee-Led Organizations (RLOs) play a central role in advocating for, supporting, and representing refugees, asylum seekers, internally displaced persons, and stateless individuals. Whether formally constituted or operating in more informal settings, associations and organizations led by refugees have a unique positioning that enables them to deeply understand the realities faced by their communities, identify their needs, and address protection gaps and challenges. For an RLO seeking to expand its influence and make its efforts more efficient and lasting, investing in governance becomes a crucial step, as it lays the foundation for organizational stability and long-term sustainability.

For the purposes of this chapter, the term **governance** refers to the **structures, systems, and practices that guide how an organization is directed and controlled**. **Good governance** requires both a well-defined **institutional framework** that sets out the organization's purpose, structure, and decision-making procedures, as well as **management practices** that allow the organization to function effectively and ethically in everyday operations.

Recognizing the importance of investing in both key dimensions of governance - institutional frameworks and day-to-day management practices - this module provides useful tools to help your organization build structured, transparent, and accountable governance systems that align with your mission and operational needs.

In particular, this module:

- Explains how to create an institutional framework by adopting a foundational document. It explains what a constitution is and outlines its core elements (Section 1), and additionally:
    - Guides your organization in selecting the appropriate legal status, detailing different options and their implications (Section 1.1).
    - Provides tools to define your organization's purpose and mission, ensuring clarity in objectives and strategic direction (Section 1.2).
    - Introduces governance models. (Section 1.3).
- Outlines key governance practices that help your organization function effectively in your daily operations (Section 2).
    - Introduces strategic assessment and planning tools to help your organization evaluate its position, set goals, and create actionable strategies for growth (Section 2.1).
    - Provides guidance on organizing and managing meetings to ensure they are structured, efficient, and aligned with the organization's objectives (Section 2.2).

1. CREATING AN INSTITUTIONAL FRAMEWORK

Building a clear institutional framework for your organization means establishing a well-defined structure and outlining the fundamental rules that guide your operations. Organizations usually define their institutional frameworks through a **constitution or foundational document**, which serves as a guide for the organization's internal rules and operational principles.

Even for organizations that do not seek formal registration, drafting a simple internal document can provide clarity and help ensure that all members share a common understanding of how the organization functions. The following elements should be considered in drafting the constitution:

NAME AND LOCATION	Include the official name of the organization and the location where it operates/where it is formally registered. Creativity is a plus (example: catchy play on words, as Arc Essentiel, LGBTQI RLO playing around the rainbow word)	
LEGAL STATUS	Specify the legal status of your organization (e.g. NGO, Association, etc.)	à *See section 2 of this module*
MISSION STATEMENT	Clearly explain your mission, purpose and vision.	à *See section 3 of this module*
MEMBERSHIP	Define eligibility criteria, rights, and duties of the members of your organization.	
GOVERNANCE MODEL	Specify the governance model adopted by your organization and the related rules. Mention also decision-making processes and accountability measures taken.	à *See section 4 of this module*
FINANCIAL MANAGEMENT	Detail how financial resources are managed, including funding, budgeting, reporting, and accountability measures.	à *To learn more about funding, see module 3*
ETHICS	Establish ethical guidelines and standards of behavior that members and leaders must follow.	*à To learn more about ethics and PSEA, see modules 5 and 6*

RULES FOR AMENDEMENTS	Specify how changes to the constitution can be made, outlining the process for proposing and approving amendments.	
DISSOLUTION OF THE ORGANIZATION	Define the process for dissolving the organization, including how assets and remaining funds will be distributed in the event that the organization ceases operations.	

1.1 FINDING THE RIGHT LEGAL STATUS FOR YOUR ORGANIZATION

To maximize the impact of your activities it is fundamental to choose the right legal status for your organization. The legal options available for your organization may depend on national legal frameworks but also on your organization's goals and capacity.

TOOL: LEGAL STATUS GUIDELINES

This tool guides your organization through the decision-making process for selecting a legal status by explaining how to identify available options, assess their implications, and make informed choices.

STEP 1: FINDING INFORMATION ON LEGAL OPTIONS IN YOUR COUNTRY

📌 Action: Identify the legal statuses available in the country where your organization operates.

Consider consulting with:

- **Local NGOs and CSOs:** NGOs and CSOs operating in your region may provide legal guidance on registration processes and help you understand regulatory requirements.
- **Peer RLOs**: Connecting with other RLOs in your region can provide insights into practical challenges and solutions.
- **UNHCR**: Depending on the operational context, UNHCR may directly provide guidance on registration processes (also in the context of broader capacity-building programmes for RLOs) or provide relevant contacts.

STEP 2: UNDERSTANDING YOUR OPTIONS

📌 Action: Understand the regulatory frameworks that govern the legal options available in your country.

While legal frameworks vary by country, RLOs generally have the following options:

1. **Unregistered/Informal Organization**
    - Operates without legal recognition.
    - Suitable for small, community-led initiatives.
    - Can be more flexible but may lack access to certain types of funding and partnerships.
2. **Non-Governmental Organization (NGO) or Non-Profit Organization (NPO)**
    - Requires formal registration with government authorities.
    - Can engage in national and international partnerships.
    - Eligible for grants and donor funding.
    - Subject to requirements established by national legislation.
3. **Association**
    - Often a simpler structure than an NGO but still requires formal registration.
    - Generally focused on social, cultural, or humanitarian activities.
    - Some restrictions may apply in terms of financial management and governance.
4. **Cooperative or Social Enterprise**
    - A hybrid model between a business and a non-profit.
    - Generates income through services or products while maintaining a social mission.

STEP 3: COMPARE OPTIONS AND MAKE AN INFORMED DECISION

📌 Action: Consider pros and cons of each option and find the most suitable for your organization. Relevant questions may include:

- Is formal registration necessary at this stage?
- What level of administrative capacity does the organization have?
- Does the organization need to receive funding from donors or government sources?
- Does the organization need to enter contracts, open a bank account, or hire staff?
- What is the main goal of the organization (e.g. advocacy, service delivery, etc.)?

Depending on your answers, you can weigh the benefits and challenges that come with each option and make an informed decision.

1.2 DEFINING YOUR ORGANIZATION'S PURPOSE, MISSION, VISION AND OBJECTIVES

BEST PRACTICE FROM THE FIELD

from UNHCR Malta and East to West Communications

Every organization operates with a purpose, a mission, a vision, and specific objectives, but what exactly sets these concepts apart? While they are often used interchangeably, each plays a distinct role in shaping an organization's identity and direction. The information in this section is adapted from materials originally developed by UNHCR Malta, which has carried out several initiatives in collaboration with RLOs, including targeted capacity-building programmes. In 2017, UNHCR Malta also supported the development of three toolkits for RLOs focused on key areas of organizational work: governance, communication, and fundraising. These toolkits were produced by the NGO *East to West Communications* following a series of workshops commissioned by UNHCR.

Purpose (the "why"):

- Defines the core reason your organization exists.
- Timeless and does not change, even as strategies evolve.

- Example: *"To empower refugee-led organizations to create sustainable solutions for their communities."*

Mission (the "what" and "how"):

- Describes what the organization does and how it achieves its purpose.
- Provides a clear, actionable statement that guides daily operations.
- More concrete and specific than the purpose.
- Example: *"We provide capacity-building, advocacy support, and funding opportunities to strengthen the impact of refugee-led organizations."*

Objectives (the "measurable outcomes"):

- SMART: Specific, Measurable, Achievable, Relevant, and Time-bound.
- Example: *"Train 500 refugee-led organizations in advocacy and leadership within the next five years."*

Vision (the "future destination"):

- Defines the long-term aspiration or the ideal future the organization is working toward.
- Example**:** *"A world where refugee-led organizations are recognized as key drivers of sustainable solutions and policy change."*

While objectives may evolve over time, it is essential to establish from the outset a clear vision for your organization, along with a well-defined purpose and mission to achieve it. These elements form the foundation of any successful organization, providing long-term direction and coherence. To effectively communicate your vision, purpose and mission, it is crucial to summarize these elements in a strong and concise mission statement that should be incorporated into your foundational documents.

A well-crafted mission statement is important because:

- It provides a clear direction for your organization's work, helping align your team and ensuring everyone is working toward the same goals.
- If strengthens your ability to engage with donors, partners, and stakeholders by clearly conveying what you do, how you do it, and why.

TOOL: MISSION STATEMENT GUIDELINES

This tool will guide your RLO in defining its **purpose, mission, vision, and objectives**, laying the foundation for a mission statement that accurately reflects and integrates these key elements.

STEP 1: DEFINE YOUR PURPOSE, MISSION, VISION AND OBJECTIVES

To define the key elements, discuss the following questions within your organization:

Purpose:

- Why does our organization exist?

Mission:

- Who do we serve?
- What challenges or needs are we addressing?
- What solutions or services do we provide?
- How do we achieve our impact?
- What makes our approach unique?

Vision:

- What long-term change do we want to see in the world as a result of our work?
- How would the future look if our mission were fully realized?

Objectives:

- What specific short-term objectives do we need to achieve to move closer to our vision?

- Are these objectives “SMART”?
    - SPECIFIC: Are we clear about what exactly we want to achieve? Have we described the objective in a way that leaves no room for confusion?
    - MEASURABLE: How will we know if we’re making progress? What indicators or milestones can help us track our results and stay motivated?
    - ACHIEVABLE: Is this goal realistic, given our current resources and capacity? Are we challenging ourselves without setting the bar so high that we risk discouragement of staff and volunteers?
    - RELEVANT: Does this objective align with our organization’s mission and vision? Will it help move us closer to the kind of impact we’re working to create?
    - TIME-BOUND: Have we set a clear deadline? Do we know when we want to achieve this, so that we can plan and act with a sense of direction and urgency?

STEP 2: USE A MISSION STATEMENT FORMULA

Once you have identified the key elements, you can structure your mission statement, to be included in your constitution/foundational document, using a formula like this: *"[Organization Name] exists to [action] for [target group] by [key activities], ensuring [impact/outcome]."*Example: *"Organization ABC exists to empower refugee youth by providing education and vocational training, ensuring greater access to employment and self-sufficiency."*When creating a “mission statement” it is important to:

- Keep it clear and concise (ideally one or two sentences)
- Ensure it reflects your organization’s core values and approach

1.3 ADOPTING A GOVERNANCE MODEL

A well-defined governance model ensures that leadership roles, decision-making processes, and responsibilities are clear, allowing the organization to function effectively and transparently. RLOs can adopt different governance models depending on their size, needs, and legal status, choosing between:

- **Basic governance models:** e.g., a leadership team with shared responsibilities, suitable for informal RLOs.
- **Intermediate governance models:** e.g., a committee with designated office bearers, suitable for small- and medium-sized registered RLOs.
- **Advanced governance models:** complex structures including a general assembly, executive committee, board of directors, and additional governance bodies for larger or RLOs.

2. GOOD GOVERNANCE PRACTICES IN DAY-TO-DAY OPERATIONS

Establishing an institutional framework through a constitution and a governance model is just the first step for ensuring your organization functions effectively. Beyond defining governing rules and decision-making processes, your organization must adopt effective practices in its daily operations to ensure it operates smoothly and upholds the values and policies written in its constitution. That is to say that good governance is not just about having policies on paper: it is also about how an organization implements and upholds them every day.

With this in mind, the following sections provide practical guidance on key governance practices that can help you run your organization efficiently and strategically. The module begins with strategic assessment and planning, guiding your organization in evaluating its current position, setting clear objectives, and developing actionable growth strategies (à *see section 2.1*). It then provides tools and techniques for organizing and managing meetings, ensuring they are structured, efficient, and aligned with your organization's goals (à *see section 2.2*).

2.1 STRATEGIC ASSESSMENT AND PLANNING

To make your organization grow it is fundamental to first take a step back and assess its current position. Understanding where your organization stands - what is working well, what challenges exist, and where improvements are needed - is the basis for setting a clear direction for the future and making informed decisions. Strategic assessment and planning, in fact, help leaders and members move beyond reactive decision-making and instead develop a long-term vision that aligns with the organization's mission. This is especially important for RLOs, which often operate in unpredictable or emergency environments and must adapt to changing circumstances while maintaining their core objectives.

To support this process, various assessment and planning models can be used to analyze an organization’s strengths, challenges, and opportunities for growth.

Common strategic planning models are:

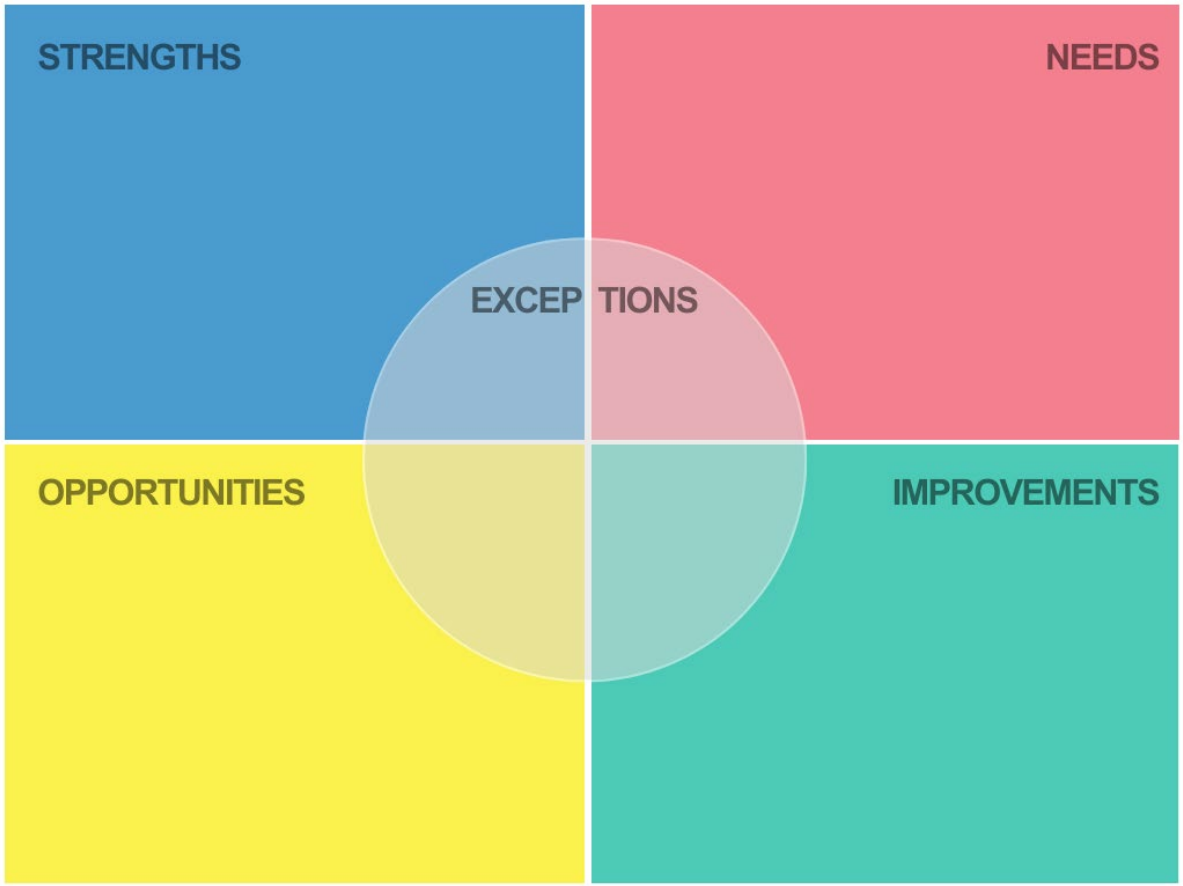
- **Lean Canvas**: a simplified, one-page business model framework that helps organizations define their key activities, resources, target beneficiaries, and impact strategy. While originally designed for startups, it is often used for non-profit organizations.

- **SWOT Analysis**: SWOT (Strengths, Weaknesses, Opportunities and Threats) is a structured tool that helps organizations evaluate internal strengths and weaknesses, while identifying external opportunities and threats.
- **NOISE Analysis:** NOISE (Needs, Opportunities, Improvements, Strengths, and Exceptions) is an alternative to the SWOT model. While SWOT analysis is a well-known tool for strategic reflection, some organizations, especially those working in fast-changing or grassroots contexts, may find NOISE analysis more practical. Unlike SWOT, which emphasizes weaknesses and threats - factors that can sometimes feel overwhelming, especially when root causes are difficult to address or do not depend on the organization - the NOISE Model takes a more forward-looking and solution-oriented approach, focusing more on identifying what is already working and what can be realistically improved.

Each of these models provides a different approach to strategic assessment and planning, but many others exist, and you should choose or adapt the one that best suits your organization's needs and goals. What matters most is not which specific model is used, but rather your commitment to reflecting on the organization’s current situation, understanding its challenges and opportunities, and developing strategies for sustainable growth.

TOOL: NOISE MODEL TEMPLATE

The NOISE Model is a structured tool designed to help organizations assess their current situation and identify clear steps for growth.


STRENGTHS
NEEDS
EXCEP TIONS
OPPORTUNITIES
IMPROVEMENTS

Complete this template by first identifying your strengths, followed by your needs, opportunities, and areas for improvement, and conclude by reflecting on exceptions of the N.O.I.

2.2 ORGANIZING AND MANAGING MEETINGS

Organizations hold meetings to exchange ideas, coordinate activities, and make key decisions. However, to ensure their effectiveness, it is important to consider that some meetings require careful preparation, especially when they involve complex discussions or significant decisions. In fact, while informal or operational meetings, addressing more practical issues, may not always require planning, more strategic meetings demand a well-structured approach and thoughtful organization.

This is particularly true for meetings with partners or stakeholders, where collaboration on shared projects and common goals is discussed. Regardless of the type, well-run meetings are essential for keeping your organization efficient: without a clear structure, meetings can become unproductive, leading to confusion and disengagement. On the contrary, a well-run meeting maintains focus, ensures that all voices are heard, and helps align discussions with the organization's mission.

To maximize their effectiveness, meetings should follow a clear agenda, outlining key discussion points and decisions, and conclude with a clear articulation of follow-up or action items. Recording minutes is also important, as it creates a written record of decisions, assigned responsibilities, and next steps, ensuring continuity and accountability within the organization.

TOOL: MEETING AGENDA TEMPLATE

Agendas establish the structure and flow of a meeting by outlining key topics and setting priorities, ensuring clarity and preparedness among future participants.

Different agenda templates can be used and adapted depending on the meeting's purpose and requirements.

The template provided here below includes fundamental details such as the date, time, location (or online meeting link), facilitator or chairperson, and list of participants. It is structured into sections for discussion topics, where each agenda item is clearly outlined along with key points to be addressed.

A dedicated space for additional notes allows for the documentation of important remarks, follow-up actions, or unresolved issues that may require further discussion.

Various customizable agenda templates are also available for free on platforms such as Canva and Microsoft, offering additional flexibility to tailor meeting structures to your organization's needs.

Meeting Agenda

Date & Time:
Location / Online link:
Facilitator / Chairperson:
List of Participants:

Topic Item 1:

Key points:

- 1.
- 2.
- 3.

Additional Notes:

- 1.
- 2.

Topic Item 2:

Key points:

- 1.
- 2.
- 3.

Additional Notes:

- 1.
- 2.

TOOL: MEETING MINUTES TEMPLATE

Meeting minutes are an official record of what was discussed and decided during a meeting, ensuring relevant information is clearly documented and accessible to all relevant stakeholders. Well-structured minutes help maintain transparency, serving as a reference for those who attended and as a guide for those who may need to stay informed but were unable to participate.

Different templates can be used and adapted depending on the nature of the meeting and the level of detail required.

The template provided here follows the structure of the Meeting Agenda Template, reiterating key elements such as the date, time, location (or online meeting link), facilitator or chairperson, and list of participants to maintain consistency in meeting documentation. It is organized into sections that correspond to agenda items, allowing key discussion points, decisions made, and assigned responsibilities to be clearly recorded. A dedicated space for follow-up actions and additional notes ensures that important outcomes are tracked and that all relevant information is easily accessible for future reference.

Again, free customizable minutes templates can be found on platforms like Canva and Microsoft, allowing your organization to tailor documentation to best fit your needs.

Meeting Minutes

Date & Time:
Location / Online link:
Facilitator / Chairperson:
List of Participants:

Agenda Items:

Topic Item 1:

- Discussion Points:
- Decisions:
- Responsibilities/Follow-Up Actions:

Topic Item 2:

- Discussion Points:
- Decisions:
- Responsibilities/Follow-Up Actions:

Next Steps and Follow-Up Actions:

Next Meeting Date and Time:

Additional Notes:

MODULE 2: COMMUNICATION

Communication is a fundamental pillar for any organization, acting as a bridge that connects its work and vision with the wider world. This is particularly true for Refugee-Led Organizations, whose impact usually depends on their capacity to communicate effectively with an extremely diverse network of stakeholders.

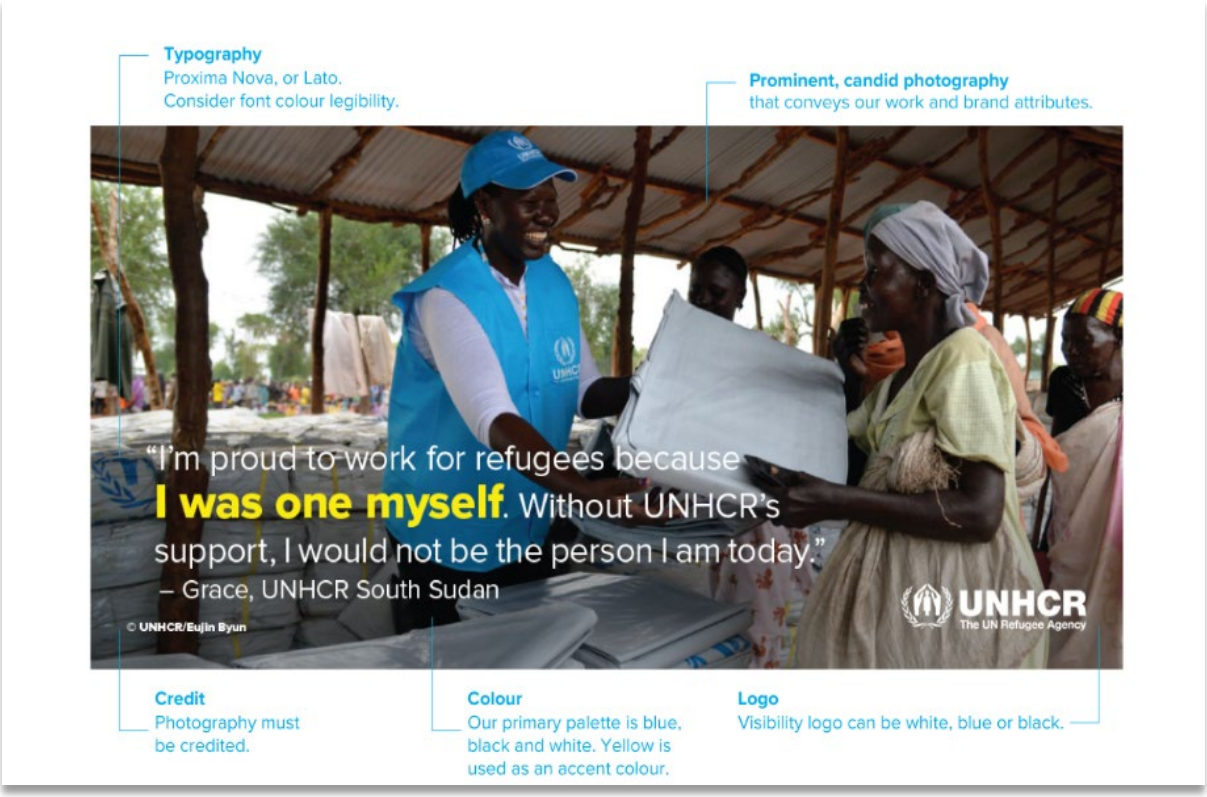
This module offers insights to help you communicate strategically, identify your target audiences and your channels for reaching them.

In particular, this module:

- Offers tools to help establish a brand and visual identity for your organization, ensuring that your values and mission are effectively communicated (Section 1).
- Helps create a communications plan (Section 2).
- Provides guidance on crafting clear and compelling messages, along with resources for building impactful advocacy strategies (Section 3).
- Provides insights into digital communication and social media tools, offering practical tips to strengthen online presence and expand reach (Section 4).

1. BRANDING AND VISUAL IDENTITY

Branding goes beyond having a name or logo: it is about building the identity of your organization. A well-crafted brand identity helps translate your organization's values and work into visual and verbal elements that resonate with different audiences. It influences how people perceive your organization and fosters recognition and trust among communities, donors, and institutional partners.



TOOL: VISUAL IDENTITY TIP SHEET

A consistent visual identity helps your audiences easily recognize your organization across different platforms and materials.

Consider these tips:

- **LOGO AND BRAND COLOURS**: Ensure your logo is simple, memorable, and reflects your mission. Choose one main colour and 2-3 additional brand colours and use them consistently. Make a note of colour codes to ensure a consistent colour palette across all materials. If needed, you can select a wider palette of colours specifically for data visualization (such as charts or graphs) that require more colours and greater contrast.

- **TYPOGRAPHY**: Choose fonts that are easy to read and align with your brand's personality. Avoid using fonts that are too stylistic or cartoonish. You can also establish guidelines on sizing, spacing and style.

- **IMAGERY**: Use images that resonate with your audience and reflect your work's impact. Show what is being done and who benefits from the work you do. As a rule of thumb, avoid excessively sharing images of meetings and staff in office environments. Make sure you have obtained informed consent from the people you photograph (ensuring they give permission for their image to be used after receiving an explanation of how and where it may appear).

- **CONSISTENCY**: Maintain a consistent visual style across all platforms to build recognition and trust. Make sure to use the same logo, fonts, and brand colours across all communications materials and channels.

- **DESIGN TOOLS**: Advanced software like Adobe Photoshop allows for greater control over complex design projects but can be challenging to use. For a more accessible alternative, consider Canva, a user-friendly platform that helps you design social media graphics, flyers, posters, brochures, and other visual materials. Nonprofit organizations can apply for free access to Canva's premium features. If you're not proficient in graphic design, consider also browsing Canva tips for non-designer users.

2. CREATING A COMMUNICATIONS PLAN

Creating a communications plan allows your organization to be strategic and intentional in how it shares its message, engages audiences, and builds visibility around its work and impact.

COMMUNICATIONS PLAN TEMPLATE

- **Step 1. Set your overall outcome**

  Establish what the overall objective and outcome is of the communications plan.

  E.g., Increase awareness of refugees, stateless people and the impact of "RLO X" in "country name".

- **Step 2. Create communications objectives**

  Set 4-5 objectives of your communications plan

  E.g., 1. Build awareness: Increase the general public's awareness of the challenges and solutions faced by refugees, and "RLO X's" impact....

- **Step 3. Expand further on each objective and how you will achieve it.**

  E.g., Increase the general public's awareness of the challenges faced by refugees and the way in which "RLO X" identifies and pursues solutions.

  - By telling refugee stories, we can communicate their challenges and their aspirations and achievements;
  - By showcasing the presence of "RLO X" on the ground and its impact on the lives of refugees;
  - By mobilizing communications around key events, meetings and moments.

- **Step 4. Outline the channels you will utilize for communications**

  This list would include social media, website, multimedia content production like photos and videos, engagement with the media, missions and meetings.

- **Step 5. Track your success and impact**

  Create a table and include your communications objectives, the audiences you want to reach, communications activities and indicators that will allow you to measure impact.

E.g.

	PRIMARY AUDIENCE	ACTIVITIES	INDICATORS
BUILD AWARENESS: **Increase awareness of the challenges faced by refugees and the way in which "RLO X" identifies and pursues solutions**	Members of the public in country X Donors, partners and international community National, regional and international media	Build engagement through RLO-led missions and events for media and local interlocutors Share human stories and content that enables refugees to communicate the challenges and opportunities they face Build a trusted network of national and international media contacts	# mentions in national and regional media # monthly emails to partners and donors # events supported by comms # videos highlighting "RLO X" impact #Media missions supported #PRs issued to international media

3. EFFECTIVE MESSAGES AND ADVOCACY

Knowing exactly what core messages you want to convey is the first step in any successful communication strategy or plan.

In addition to a few core messages closely tied to your organization's mission, vision, and goals, there will be times when more nuanced or specific messaging is needed. Sometimes, the goal may be to shape public opinion on an issue, while in other cases, you may seek to evoke empathy or inspire a concrete action. In any case, how you frame your message should always align with the response you want to generate within a particular audience.

TOOL: KEY MESSAGES TIP SHEET

Consider these tips:

- **CORE MESSAGES**: Your mission, vision, and values form the foundation of your communications, so start by developing a set of core messages based on your "mission statement" (→ *see module 1, section 1.2*). These should be concise, relevant, and easy to understand, making them adaptable for social media, but also media interviews, panel discussions, and other key communication moments.

- **AUDIENCE-SPECIFIC MESSAGES**: Tailor your messages to your audiences. Take into consideration both their role (e.g. donors, volunteers, the communities support) and familiarity with the topic.

- **POSITIVE MESSAGING**: Frame your messages in a way that emphasizes solutions rather than just problems. Communication and advocacy are more effective when they focus on what can be achieved rather than what is wrong, as this approach fosters hope, engagement, and motivation for action (e.g., instead of saying "we must stop discrimination against refugees," phrase it as "we must build inclusive communities where refugees can thrive").

- **STORYTELLING**: Use stories to illustrate your impact and connect emotionally with your audiences. These could be personal narratives from the people you support, success stories about community projects or interviews with volunteers. Use various media, images, videos or illustrations to make the stories more engaging.

- **CALL TO ACTION**: Whenever possible, consider including a clear and compelling call to action in your communications. This will let your audiences know how they can support your mission, for example by donating, volunteering or sharing your message.

RESOURCES: ADVOCACY TOOLKITS

Advocacy is about persuading and mobilizing others - whether decision-makers, specific audiences, or the general public - to support a cause or take an action that drives the change you seek and brings your vision closer to reality. While a major part of advocacy revolves around developing clear communication and strong messaging, an advocacy strategy goes much further than that. It requires the ability to understand the political and social landscapes, to build constructive relationships with the right stakeholders, and to engage in strategic negotiation to advance your goals. That's why advocacy should always be approached with a clear plan, combining communication efforts with broader action.

To help you think beyond effective messaging and develop a well-rounded advocacy strategy, here are some useful toolkits and training resources you can use:

- **Protection Advocacy Toolkit:** Developed with contributions from NEAR, the Global Protection Cluster, Oxfam, ODI, and UNHCR, this toolkit provides practical guidance on protection advocacy by breaking down the process into key steps. It helps organizations define protection advocacy objectives, select effective approaches and tactics, monitor and measure outcomes, and manage risks associated with advocacy.

- **Training Kit on Empowering Refugee-Led Community Organisations**: Developed as part of an Erasmus+ project led by Aditus Foundation, this advocacy training kit was created in collaboration with multiple human rights organizations, including "Mosaico – Azioni per i Rifugiati", an Italian RLO that has been working closely with UNHCR MCO Italy for years. Designed to strengthen advocacy skills, this resource provides comprehensive training materials available in different versions depending on whether the advocacy of your RLO is focused at the EU or the national level.

4. DIGITAL COMMUNICATION AND SOCIAL MEDIA

Maintaining a strong online presence has become essential for any organization seeking to effectively reach and engage its audiences.[1] People increasingly rely on social networks not only for personal communication and staying in touch with their close circles, but also for staying informed, exchanging ideas and shaping their opinions.[2] This means that social networks are important platforms to showcase your organization's activities, promote initiatives, or fundraise effectively, but also powerful tools for advocacy and awareness-raising, as well as for outreach and community engagement.

TOOL: SOCIAL MEDIA TIP SHEET

Consider these tips:

- **PLATFORM SELECTION**: Choose social media platforms that best reach your target audience (e.g., Facebook, Instagram, X/Twitter, LinkedIn, TikTok). Check that your audiences are present and investigate how they use the platform (e.g., some may prefer video content, while others engage more with text or interactive features). A survey can be an effective way to gather information about how your audience uses social media.

- **CONTENT STRATEGY**: People connect with stories, not institutions, so focus on showcasing beneficiaries' experiences to create emotional engagement. Inspirational quotes make your message more relatable and encourage interaction, while statistics add credibility and strengthen advocacy efforts. Awareness days (e.g. World Refugee Day) provide opportunities to join global conversations, mobilize supporters, and increase visibility through targeted campaigns.

- **CALENDAR AND PRESENCE**: Develop a content calendar to plan ahead.

[1] International Telecommunication Union, Facts and Figure 2024
[2] Eurostat, 59% of EU individuals using social networks in 2023, 19 March 2024

- **ENGAGEMENT**: Actively engage with your audience by responding to comments, messages, and mentions. Respond to constructive criticism but avoid engaging with deliberately inflammatory or provoking comments.

- **ANALYTICS**: Regularly review analytics to understand what works and adjust your strategy accordingly. Track metrics such as reach, engagement, and conversion rates to gain insights into your audience.

- **NEWSLETTERS**: Building a contact list of emails and sending out regular newsletters can be a powerful way to engage with audiences, for example to maintain relationships with donors, partners and supporters. Some email marketing tools, like MailerLite, offer free plans or discounts for small organisations or no-profits.

TOOL: WEBSITE TIP SHEET

A website is an important digital tool for any organization, serving as a central hub for information, engagement, and outreach. A well-structured and optimized website enhances visibility, credibility, and accessibility.

Consider these tips:

- **PLATFORM SELECTION:** Choose a website-building platform that suits your organization's needs and technical skills. WordPress offers flexibility and customization, Wix and Squarespace provide user-friendly drag-and-drop features, and Google Sites is a simple free option for smaller initiatives. If your organization has access to technical support, custom-built sites offer greater control.

- **SECTIONS:** Your website should include key sections such as "Home" (a clear introduction to your mission), "About Us" (your vision, team, and history), "Projects/Initiatives" (showcasing your work and impact), "Get Involved" (volunteer, donate, or support), "News/Updates" (blog posts, events, and announcements), and "Contact" (a clear way for visitors to reach you). A "F.A.Q." section can also be useful to address common inquiries.

- **SEARCH ENGINE OPTIMIZATION (SEO):** Improve your website's visibility by optimizing it for search engines. Use relevant keywords in page titles, descriptions, and content, ensure fast loading speeds, and include alt text for images.

- **PROMOTION AND TRAFFIC:** Publicize your website by integrating it into all communication channels (include the link in social media bios, email signatures, and newsletters). Share new website content on social networks and consider collaborations with other organizations to expand your reach.

- **MOBILE OPTIMIZATION:** Ensure your website is mobile-friendly, as many users will access it from their phones.

MODULE 3: COMMUNITY ENGAGEMENT AND OUTREACH

A "**COMMUNITY**" can be described as a group of people that recognizes itself or is recognized by outsiders as sharing common cultural, religious or other social features, backgrounds and interests, and that forms a collective identity with shared goals. However, what is externally perceived as a community might in fact be an entity with many sub-groups or communities. It might be divided by origin, language, religion or other characteristics.

Being led by individuals with lived experience of displacement, RLOs are deeply rooted in the **communities** they serve and possess firsthand knowledge of the realities and challenges displaced populations face. However, being part of a displaced community does not automatically grant an RLO the ability to represent or engage with everyone within it effectively. Displaced communities are diverse, formed by individuals with varying backgrounds, experiences, needs, and aspirations. Meaningful community engagement and outreach are therefore essential not only to ensure that different voices are heard and considered but also to tap into the wealth of talent, ideas, and solutions that exist within the community itself.

Building strong and constructive relationships with the community you serve can benefit your organization in multiple ways.

First and foremost, engaging effectively with your community helps strengthen the **legitimacy and accountability of your organization**, ultimately amplifying your reach and impact. If your mission involves advocating for refugee rights or providing services to your community, you need to have a clear and comprehensive understanding of your community's needs, including those of underrepresented or marginalized groups whose experiences may sometimes be overlooked or harder to access. Actively listening to and incorporating feedback from the people you serve allows you to align your priorities more closely with theirs, ensuring that your work remains always representative of their perspectives and adaptable to needs that may also evolve and shift over time.

At the same time, community engagement and outreach can help you **expand the support that your organization needs**. When the members of your community trust you and see themselves reflected in your actions, it is easier to encourage their participation and gain their support. Your community is one of the greatest resources you have, bringing together individuals with diverse talents and experiences who can contribute to strengthening your work each in their own way.

Some members of your communities may wish to take an active role by joining as members or volunteers, applying their skills and passion to support your initiatives. Others may choose to participate and contribute in less direct but equally valuable ways, deciding to offer financial contributions or to amplify your voice and attend your initiatives.

Maintaining strong ties with your community can also pave the way for future networking and partnership opportunities, as new groups and organizations may emerge. RLOs are stronger

when they join forces, combining their voices and expertise to maximize their impact. For example, in funding opportunities that require large-scale projects, multiple organizations offering different services can collaborate, strengthening their proposal and expanding their reach. Or again, in advocacy, a united front makes it harder for decision-makers to ignore refugee-led perspectives, increasing your chances of achieving the policy change you seek.

This is also reflected at the global level, where RLOs are playing a growing role in key platforms like the Global Refugee Forum, the world's largest international gathering on refugees led by UNHCR and held every four years. Through joint pledges and collective advocacy, refugee-led organizations are helping shape policies and commitments that directly impact their communities (→ Learn more about UNHCR's Task Team on Engagement and Partnership with Organizations led by displaced and Stateless Persons here)

This module provides practical guidance on strengthening community engagement and outreach, offering insights into practices and tools that can help you deepen your impact within your community.

In particular, this module:

- Offers guidance on understanding your community's needs in a more inclusive and effective way (Section 1).
    - Explains the role of UNHCR's Community-Based Protection (CBP) practices in fostering participatory and inclusive approaches to community engagement (Section 1.1.).
    - Introduces the Age, Gender, and Diversity (AGD) approach as a key framework to make sure that engagement efforts are responsive to the diverse realities within your (Section 1.2).
    - Offers examples of practical participatory approaches that RLOs can use to consult with their communities and better understand their needs (Section 1.3).
- Explores how to unlock the potential within your community by moving beyond consultation to meaningful participation, ensuring that members can actively contribute their talents, skills, and ideas (Section 2).
    - Covers how to transition from outreach to meaningful engagement of your community by recruiting new members and volunteers (Section 2.1).
    - Highlights the importance of reflecting diversity within your organization by embracing simple Diversity, Equity, and Inclusion (DEI) principles (Section 2.2).

1. UNDERSTANDING AND CONSIDERING THE NEEDS OF YOUR COMMUNITY

1.1 THE COMMUNITY-BASED PROTECTION APPROACH

Displaced and stateless communities understand better than any external actor the risks and challenges they face and the solutions needed to address them. For this reason, UNHCR recognizes the importance of their meaningful and active participation in every aspect of the programs that impact their lives. To put this into practice, UNHCR applies an approach called "**Community-Based Protection" (CBP)**, which ensures that communities play a central role in identifying challenges, shaping responses, and implementing solutions. CBP is integrated into areas of UNHCR's work and is applied throughout every stage of UNHCR's Operations Management Cycle - from assessment and planning to implementation, monitoring, reporting, audit and evaluation.

→ To learn more about the **CBP approach** used by UNHCR see the e-learning courses "Community-based Protection (CBP)" on Workday, accessible through the UNHCR Learning Portal

Refugee-led organizations are a powerful example of what Community-Based Protection means, proving how displaced communities are not just beneficiaries of assistance but also the driving force behind their own solutions.

However, as mentioned in the introduction of this module, being part of a displaced community does not automatically mean an RLO can effectively represent or engage with everyone in it, nor fully grasp the diverse needs of all its members, especially in the case of underrepresented or marginalized groups, whose experiences may be harder to examine or understand. For this reason, RLOs can also benefit from adopting Community-Based Protection practices, tools, and approaches that support inclusive and constructive engagement with their communities.

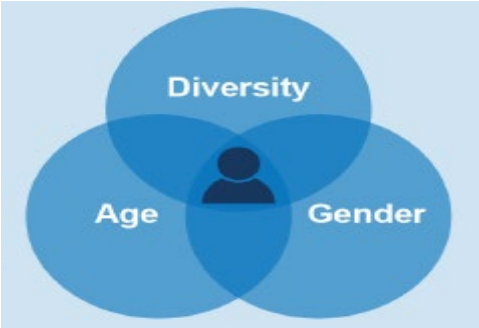
The following sections will introduce key approaches that can help your organization strengthen this engagement and ensure that diverse voices are heard and valued.

1.2 THE AGE GENDER AND DIVERSITY APPROACH

One of the key approaches RLOs should consider when engaging with their communities is the **Age, Gender, and Diversity (AGD)** approach. AGD is a fundamental principle of UNHCR's CBP framework and ensures that protection efforts are inclusive and responsive to the diverse needs of displaced populations.

→ To learn more about the AGD approach used by UNHCR, see the e-learning courses "Age, Gender and Diversity Learning Modules" on Workday, accessible through the UNHCR Learning Portal.

This approach is rooted in the recognition that age, gender and diversity characteristics vary from person to person and intersect to shape each individual's identity and experience. The AGD approach acknowledges that each person is unique, and looks to differences between persons as defining their capacities, needs and exposure to risks.



In particular, the AGD approach takes into consideration that forced displacement and statelessness affect people differently depending on their age, gender, and other diversity, and therefore understanding and analyzing how these intersecting characteristics shape individuals' experiences is essential to designing effective and inclusive responses.

The expression "**INTERSECTIONALITY**" refers to the interaction of multiple identities and experiences of exclusion/inclusion and inferiority/superiority (→ Learn more about intersectionality with this UNHCR video)

Following UNHCR's approach and ensuring the participation and inclusion of diverse AGD groups across different stages of your programmes can help you better reflect the diverse realities existing within your community and ensure that marginalized and underrepresented groups are not left behind.

In fact, applying an AGD approach should be a priority for any refugee-led organization, regardless of its specific focus. Even if your RLO is dedicated to a particular subgroup, integrating an AGD perspective remains essential to ensuring that your work is truly inclusive and responsive to the diverse needs within that group.

For example, an RLO dedicated to protecting and supporting the women of a particular national community should recognize that women of a certain nationality are not a homogenous group. An AGD perspective allows you to consider the different realities within this category: some women may be older, others younger, or girls; some may have disabilities, while others may be LBTIQ+ or face additional barriers based on their ethnicity, religion, or socioeconomic background. By recognizing these differences, you can tailor your initiatives to better meet the unique needs of those you support, ultimately increasing the impact of your work.

1.3 PARTICIPATORY APPROACHES

To truly understand and respond to the needs of their communities, RLOs can benefit from using **participatory methodologies** that help engage community members in shaping programs and solutions.

For more information on needs assessments and participatory methodologies, review UNHCR's Needs Assessment Handbook (2017)

UNHCR integrates these methodologies across all phases of programming to ensure that the voices, capacities, and priorities of diverse groups are reflected in protection efforts. For RLOs, applying similar approaches can help ensure that community engagement is inclusive, representative, and grounded in an AGD perspective.

Using adapted and diverse participatory methods can in fact help you consult meaningfully with all segments of your community, including groups that may face barriers to participation, such as older persons, individuals with disabilities, women, children, or minority groups.

Participatory methodologies[3] include:

SURVEYS
• Surveys are a quantitative data collection method for gathering information from a selected group of people or other units such as households.
• Useful for gathering information in a structured manner.

FOCUS GROUP DISCUSSIONS
• A focus group discussion (FGD) is a structured or semi-structured conversation with a selected group of individuals to gain information about their views and experiences of a topic.
• Useful for understanding the range of views and issues within a group.

KEY INFORMANT INTERVIEWS
• A key informant interview takes place with individuals with prior and specific knowledge on an issue, situation, group or location. It uses a structured or semi-structured questionnaire adapted to respondents' expected knowledge, for example about the impact of the crisis among different population groups, protection risks, challenges, opportunities and resilience.
• Useful for exploring issues that communities do not want to discuss openly, e.g. taboo topics, due to fear of reprisals or shyness and nervousness.
• Useful for exploring an issue in more depth.

PARTICIPATORY OBSERVATIONS
• Observation is an individual or team activity to look at the actual situation in a location, and/or the situation and behaviour of certain people in a given location (e.g. to triangulate existing information).
• This may include walking with local people through an area, using the opportunity to observe, discuss and listen to the variety of people encountered and stopping at areas identified by you or the group. This approach may be useful to identify particular barriers or protection risks, such as physical barriers in the environment or risks to access services (e.g. road safety).
• Useful for understanding the range of views and issues that exist in a particular location.

COMMUNITY WORKSHOPS
• A participatory workshop involves facilitating discussion and collaborative activities for community members to collectively explore a specific topic.

[33] From "UNHCR - Age, Gender and Diversity textbook version - AGD training course", p. 50.

• Useful for a range of purposes, including mapping relationships, identifying root causes of problems, and identifying priorities and solutions.

2. UNLOCKING THE POTENTIAL WITHIN YOUR COMMUNITY

Engaging with your community is not just about identifying needs and providing services, but also about recognizing and harnessing the talents, skills, and solutions of community members to strengthen your organization. Meaningful participation goes beyond mere consultation and involves creating the conditions for members of your community to contribute effectively to your work.

By unlocking the potential within your community, your RLO can expand its impact, enhance innovation and build a stronger and more inclusive foundation for long-term sustainability.

2.1 FROM OUTREACH TO ENGAGEMENT: ATTRACTING MEMBERS AND VOLUNTEERS

Outreach is the first step in building strong connections with your community, but to deepen this relationship and create more significant forms of engagement, people need to feel motivated to contribute and take an active role in your organization.

However, attracting and keeping members requires more than just raising awareness on your mission and sharing your work: it takes intentional efforts to create a sense of belonging and purpose within your RLO, where people feel valued, motivated, and empowered to contribute.

TOOL: TIP SHEET FOR ATTRACTING MEMBERS AND VOLUNTEERS

This tipsheet provides guidance on strategies to attract members and volunteers (→ see also *Module 7, Section 3 to learn more about volunteer training and management, including motivation and retention strategies*).

Consider using these tips:

1. DEVELOP A STRONG OUTREACH STRATEGY

- Use **diverse communication channels** to reach potential members and volunteers (e.g., social media, community events, word-of-mouth), investigating what works best within your community.
- Host **community meetups or information sessions** where people can learn about your RLO.
- Partner with **local organizations, schools, and networks** to expand recruitment efforts.

2. CLEARLY DEFINE THE VALUE OF JOINING YOUR RLO

- Make it clear what **roles members and volunteers can play** in your organization, offering different levels of engagement (e.g. employees, active members, registered volunteers).
- Highlight how their participation contributes to **meaningful change** in the community.

3. MAKE PARTICIPATION ACCESSIBLE AND INCLUSIVE

- Offer **flexible opportunities** to accommodate different availability levels.
- Ensure that meetings and activities are **held at convenient times and locations**.

4. CREATE A WELCOMING AND SUPPORTIVE ENVIRONMENT

- Build a **mentorship or buddy system** where new members are supported by experienced ones.
- Organize **social and networking events** to strengthen relationships within your RLO.

5. KEEP MEMBERS AND VOLUNTEERS ENGAGED

- Celebrate contributions through **recognition programs** (e.g. certificates, appreciation events, thank-you messages).
- Offer **training opportunities** to develop skills and leadership among members.
- Give members a say in decision-making to **foster a sense of ownership**.
- Provide clear **pathways for growth** (e.g. leadership roles, project coordination).

2.2. LEVERAGE THE DIVERSITY OF YOUR COMMUNITY

This module highlighted the importance of applying an Age, Gender, and Diversity approach to ensure that your programs are inclusive and responsive to the diverse needs of your community (→ *see Section 1.2*). Another way to not only recognize the diversity that exists within your community but also to harness its full potential is by reflecting it within your team.

A workforce of members and volunteers from different backgrounds and experiences strengthens your organization's ability to understand, represent, and engage with different groups and individuals in your community. Additionally, bringing together diverse perspectives fosters creativity and innovation, helping your organization develop more adaptive and effective solutions to the challenges your community faces.

To make the most of the diverse talents within your community, your organization should ensure equal access to opportunities at all levels for everyone, actively removing barriers that might prevent marginalized or underrepresented groups from participating and encouraging diverse candidates. In line with this, it's also essential to create an environment where every individual feels valued and supported, allowing them to contribute meaningfully and reach their full potential.

One of the best ways to foster such an environment is by developing a Diversity, Equity, and Inclusion (DEI) framework. While creating a full DEI policy may be challenging for smaller RLOs, even integrating basic DEI principles can make a significant difference in embedding inclusivity into your organization's culture and actively preventing discrimination and exclusion.

TOOL: DIVERSITY EQUITY AND INCLUSION TIP SHEET

GOOD PRACTICE FROM THE FIELD

From UNHCR MCO Italy

Ensuring diversity, equity, and inclusion in your organization doesn't require complex policies: even small and intentional actions can make a big difference. This tip sheet is an adaptation of material developed by UNHCR MCO Italy for RLOs, and provides simple, practical ways to integrate DEI principles into your organization.

Consider using these tips:

1. WORKFORCE

- **Encourage applications from diverse candidates**: Make it clear that your organization welcomes people of all backgrounds, both as employees, members and volunteers. Include a DEI statement in job postings or in the "work with us/membership/volunteering" sections of your website to actively encourage applicants from marginalized or underrepresented groups.

- **Offer a variety of roles that accommodate different skills, backgrounds, and abilities**: Allow flexible roles for people who want to contribute to your organization's success (e.g. employees, members, registered volunteers, occasional unregistered volunteers). For volunteering, consider that some members of your community may prefer contributing to community-facing activities, such as event organizing or direct community support, while others might be better suited for administrative tasks or technical roles.

2. WORKPLACE

- **Adopt a non-discrimination commitment**: Make it clear that your organization does not tolerate discrimination or exclusion based on an individual's background or personal characteristics. Encourage open dialogue and exchange regarding how the organization can better embody these values. Create a confidential and accessible process for reporting discrimination, harassment, or bias. Make sure that all members, volunteers, and staff know how to report concerns and that there are clear steps for addressing them.

- **Use inclusive language and materials**: Ensure that communication is welcoming, accessible, and representative of everyone in your community. Use clear, culturally appropriate language, avoid exclusionary terms, and respect how individuals self-identify. Provide translations or interpretation when needed and use diverse visuals that reflect different ages, genders, abilities, and backgrounds. Make materials accessible by offering alternative formats, such as large print or captions, to ensure broad participation.

3. ORGANIZATIONAL CULTURE

- **Respect diverse perspectives and foster DEI conversations**: Create a culture where different viewpoints and lived experiences are actively heard and valued. Encourage open discussions about diversity, equity, and inclusion by making space for regular conversations, feedback sessions, and reflection on how your organization can be more inclusive. Ensure that underrepresented voices are included in decision-making and that all members feel safe to express their perspectives.

- **Train staff and members on DEI principles:** Organize regular workshops or discussions to raise awareness of unconscious bias, inclusive language, and respectful engagement. Training can also focus on how to identify and address discrimination in daily work and interactions.

- **Regularly review and update DEI commitments:** Commit to ongoing learning and reflection, reviewing policies and practices to ensure they remain inclusive and effective. Encourage feedback from community members on whether they feel represented and safe within your organization.

MODULE 4: FUNDING AND PARTNERSHIPS WITH UNHCR AND OTHER ENTITIES

Learning how to secure and manage sustainable funding is one of the most crucial areas of focus for RLOs.For newly established RLOs, the immediate priority often revolves around accessing funding to ensure their survival and maintain basic operations: with limited resources and pressing community needs, these organizations frequently prioritize short-term solutions to meet urgent demands. However, it is essential for all RLOs - regardless of size or stage of development - to carve out the time and effort to transition from simply accessing funding to creating strategies that make that funding sustainable.
Achieving sustainability in funding means building long-term financial strategies that reduce dependency on single sources of income, ensuring that programs can continue uninterrupted regardless of external fluctuations.

Sustainable funding enables RLOs to grow, innovate, and maintain a proactive approach, providing the stability and flexibility needed to deliver strategic, high-quality programs that address the evolving needs of their communities. Furthermore, achieving sustainability strengthens the credibility and influence of RLOs, as donors, partners, and stakeholders - particularly in the private sector - are more likely to collaborate with organizations that demonstrate financial stability, strong resource management capabilities and a clear long-term vision, often seen as key prerequisites for establishing partnerships.

Recognizing the critical role of funding for Refugee-led Organizations, UNHCR, in its mission to advocate for RLOs inclusion in addressing the challenges of forcibly displaced and stateless people, actively invests in equipping these organizations with the tools, knowledge and economic resources needed to achieve financial resilience and growth. In line with its community-based approach, UNHCR collaborates closely with RLOs worldwide, promoting joint initiatives and providing tailored forms of partnership that amplify their impact. This commitment translates into various forms of collaboration between UNHCR and RLOs, including, in some cases, direct funding to RLOs through grant agreements or funded partnerships.

With this in mind, this module offers tools and resources to help your organization develop a comprehensive funding strategy aimed at achieving sustainability, while also detailing how UNHCR collaborates with RLOs and the funding opportunities it provides to support their work.

In particular, this module:

- Guides RLOs in creating and using a roadmap for a strategic approach to funding in order to identify, pursue, and manage financial opportunities in a structured and effective way (Section 1)
- Offers tools to assess financial needs and define funding goals, helping RLOs evaluate their core operational, programmatic, and future investment costs while setting clear funding priorities aligned with their mission and needs (Section 2).
- Explains different types of funding sources and how to identify opportunities, while offering a listing of key platforms and funding entities that support RLOs and a practical tool for mapping funding opportunities (Section 3).
- Guides organizations in developing a funding action plan, ensuring that RLOs align their funding goals with available opportunities and strategically plan their fundraising efforts, and provides insights for preparing strong funding applications (Section 4).
- Provides guidance on reporting and communicating impact to funders, emphasizing the importance of transparent and consistent updates and compliance with reporting requirements (Section 5)

- Clarifies how RLOs can collaborate with UNHCR, detailing UNHCR's funding opportunities and partnership modalities, and introduce UNHCR's mandate, operational structure and results-based management approach, helping RLOs understand how UNHCR plans, implements, and evaluates its work, and how partners fit into this framework (Section 6).

1. BUILDING A ROADMAP TO APPROACH FUNDING STRATEGICALLY

Taking a strategic approach to funding requires a clear plan that guides your organization through the complex process of identifying, pursuing, and managing financial opportunities. To map out a step-by-step strategy that helps your organization make informed decisions that contribute to long-term sustainability it can be useful to create and follow a roadmap that provides indications on what to do at each stage of the process and how to move forward effectively.

TOOL: FUNDING ROADMAP

This roadmap provides a structured yet flexible approach, allowing RLOs to navigate the funding landscape effectively and build a sustainable financial foundation. It can be adapted to align with the unique goals and specific needs of your organization.

1 UNDERSTAND THE NEEDS OF YOUR RLO

Evaluate the financial needs of your organization by considering core operational costs, program-related expenses, and potential costs associated with organizational growth.

2 DEFINE YOUR FUNDING GOALS

Prioritize areas and activities that require financial support and establish clear objectives for your funding efforts.

3 RESEARCH AND IDENTIFY FUNDING SOURCES

- Explore options such as grants, partnerships, and donations and define the funding sources that best align with your needs and goals.
- Identify and map concrete funding opportunities.

4 CREATE A FUNDING ACTION PLAN

Based on the financial needs identified, your funding goals, and the mapped funding opportunities, create a funding action plan outlining which opportunities to pursue and the necessary steps to achieve them, including timelines and assigned responsibilities.

5 TAILOR APPLICATIONS TO FUNDING OPPORTUNITIES

- Align your proposals with each funder's priorities and requirements, highlighting how your organization's work supports their goals and criteria.
- Develop a compelling narrative that explains your mission, impact, and the specific use of funds.

6 MONITOR PROGRESS AND ADAPT

- Track the success of your funding efforts and analyze what works and what doesn't.
- Refine your strategy based on results and feedback.

7 REPORT AND COMMUNICATE IMPACT TO FUNDERS

- Regularly update funders on the outcomes of their contributions.
- Show how their support has directly contributed to the success of your initiatives.
- Respect reporting requirements.

2. ASSESSING FINANCIAL NEEDS AND DEFINING FUNDING GOALS

A key initial step in developing an effective funding strategy is to assess your organization's financial needs and clearly define its funding goals.

Understanding financial needs involves evaluating your current funding position and identifying which costs are already covered and which require additional funding. To achieve this, all aspects of your organization's expenses should be evaluated, including:

- **Core operational costs**: such as staff salaries, rent, utilities, and office supplies.
- **Program-specific costs**: covering the resources needed for current projects and initiatives carried out by your organization.
- **Future investment needs**: costs related to growth, such as scaling existing projects or launching new initiatives.

Once the financial picture is clear, it is essential to establish clear funding goals that align with your priorities and vision, to ensure resources are directed where they are most needed, as not all expenses carry the same urgency or strategic importance. This clarity strengthens decision-making and helps your organization communicate its needs and potential impact more effectively to potential funders.

At the same time, it is important to think ahead to potential areas of growth and expansion. If more funding were to become available, how would your organization utilize it so as to maximize impact? How would these new initiatives complement the ongoing work of the organizaiton?

Last, consider the sustainability of funding. How can your fundraising strategy help to ensure diversification of funding sources and continuity of operations? Building the resilience of your organization against a potential shift in funding availability is key to long-term stability.

TOOL: FINANCIAL NEEDS ASSESSMENT TEMPLATE

This template helps track your current funding situation by documenting estimated costs, available funding, and funding gaps.

Expense type		Total estimated cost	Total funding available	Total funding gap	Cost per item	Funding available per item	Funding gap per item
Core operational costs							
Program-specific costs	Project #1						
	Project #2						
Future Investments	Activity #1						
	Activity #2						

3. UNDERSTANDING DIVERSE FUNDING SOURCES AND IDENTIFYING OPPORTUNITIES

To secure sustainable funding, RLOs must understand the various funding sources available and how they align with their operational needs and goals.

Key funding sources commonly accessed by RLOs include grants, donations and partnerships, as well as crowdfunding, corporate sponsorships and in-kind contributions or, less frequently, even income-generating activities. Acknowledging the absence of strict definitions or formal boundaries between these sources – often characterized by overlapping features – and that exceptions and variations may occur in practice, this table outlines the typical features associated with three of the most common funding sources RLOs use.

	Grants	Donations	Partnerships
Type of actors	Typically provided by **institutional funders**, such as governments or international organizations, or by **private actors**, such as foundations or corporations.	Typically provided by **private actors**, such as individuals or companies and foundations.	Collaborations with **various actors**, including NGOs/INGOs, private actors and even institutional actors such as international organizations.
Modality	Typically: - **project-specific** - requires **applications** - has reporting and accountability **requirements** (e.g., financial reports, progress updates) - **specific goal or outcome** defined by the grantor	Typically: - may be **unrestricted** (used for any operational needs) or **restricted** to a specific purpose - **no formal application** - **fewer** formal **requirements** than grants - donors **less likely to specify outcomes** than grantors	Typically: - **project-specific** - depending on partner's capacity may require **application or negotiation** - often formalized through **agreements** (e.g., memoranda of understanding, contracts) - efforts aligned with **shared goals**

			and mutual interests
Scale	Tend to involve larger sums of money and come with greater administrative requirements compared to donations.	Can range from small individual contributions to significant gifts but are typically less complex to manage than grants and partnerships.	Scale depends on the partners' capacity and the scope of the shared objectives but can involve significant funding and resource exchange.

Once your RLO has determined the type(s) of funding source(s) most appropriate for its needs, the next step is identifying and mapping concrete funding opportunities through strategic research and the effective use of dedicated tools and resources. This involves both regularly monitoring donor announcements and calls for proposals, and engaging with peer organizations, donor forums, and specialized networks to uncover opportunities that might otherwise go unnoticed.

RLOs operating in Europe can use several platforms and websites to identify grants and funding opportunities. RLOs can also explore national-level funding opportunities through government portals or local foundations that focus on supporting refugee integration and development initiatives.

RESOURCES: FUNDING OPPORTUNITIES CATALOGUE

This comprehensive yet non-exhaustive catalogue includes a collection of resources for funding opportunities accessible to RLOs.

Funds and grants listed below are, in most cases, not exclusively designed for refugee-led

For funding opportunities explicitly designed for RLOs by UNHCR - such as grant agreements or the Refugee-Led Innovation Fund - refer to section 6 of this module:

→ **"Partnering with UNHCR: Exploring Funding Opportunities And Understanding Our Work"**

The catalogue includes:

- A selection of key platforms where grants and partnership opportunities can be explored.
- A brief presentation of the EU Funding and Tenders Portal, and a selection of key programmes of interest for RLOs.
- A directory of funding opportunities specifically tailored for RLOs and other organizations working for communities facing displacement.
- A directory of various funding entities, including foundations, institutional actors, corporate sponsors, and other contributors that offer funding opportunities for NGOs working in different fields.
- A directory of funding opportunities specifically tailored to Women-Led Organizations (WLOs), including organizations led by forcibly displaced and stateless women.

KEY PLATFORMS FOR GRANTS AND PARTNERSHIPS

- **The UN Partner Portal**: The official UN platform that offers access to partnership opportunities from UN agencies, including UNHCR.
- **fundsforNGOs**: Global platform offering grants and resources tailored to NGOs, with materials available in Spanish, French, Arabic, and English.
- **Equality Accelerator**: Database from the INGO "Plan International" that collects funding opportunities and resources specifically supporting youth activism.

THE EU FUNDING AND TENDERS PORTAL

The EU Funding & Tenders Portal, is the central platform for EU funding opportunities, covering a wide range of sectors and beneficiaries. Given its broad scope, the portal features funding calls across diverse fields, many of which may not be directly relevant to RLOs. To identify the most suitable opportunities, you could either apply filters and use targeted keywords, to narrow down funding calls that align with your mission and areas of work (e.g. education, integration, etc.), or browse opportunities related to specific EU Programmes.

EU programmes that may be of interest to RLOs include:

- **Citizens, Equality, Rights and Values Programme (CERV)**: Programme that aims to protect and promote UE rights and develop open, rights-based, democratic, equal and inclusive societies based on the rule of law. CERV is divided into four strands, two of which may be particularly close to the missions of many RLOs':
  - **Equality, Rights and Gender Equality**: Promotes projects preventing and combating inequalities and discrimination on grounds of sex, racial or ethnic origin, religion or belief, disability, age, sexual orientation or gender identity.
  - **Daphne**: Promotes projects preventing and combating at all levels all forms of gender-based violence against women and girls and domestic violence, violence against children and young people, as well as violence against other groups at risk, such as LGBTQI persons and persons with disabilities.
- **Erasmus+**: Programme that supports education, training, youth and sport in Europe.

DIRECTORY OF FUNDS FOR RLOS

- **Resourcing Refugee Leaders Initiative**: Initiative carried out by a global coalition of six organizations, focusing on transferring resources to Refugee-Led Organizations.
- **Rainbow Railroad - Crisis Response Fund**: Designed to address the critical funding gaps faced by grassroots organizations when planning and responding to crises impacting LGBTQI+ individuals and communities facing displacement. Open to organizations working in Eastern Europe.

DIRECTORY OF FUNDING ENTITIES FOR NGOS

- **Open Society Foundations**: Funds projects addressing inequality and social justice worldwide.
- **Comic Relief**: Funds social justice and poverty reduction projects. Its approach promotes working with people with direct experience of the issues funded, such as RLOs.
- **The Ikea Foundation**: Offers grants in various thematic areas, including improving refugee livelihoods.
- **Bill & Melinda Gates Foundation**: Supports initiatives promoting education, health, and women's empowerment.
- **Ford Foundation**: Supports social justice and community-based projects worldwide.
- **Google.org**: Offers grants and technical support to organizations worldwide, helping them apply the latest technological innovations (including generative AI tools) to tackle complex societal challenges.
- **UK Foreign, Commonwealth & Development Office (FCDO)**: Offers funding opportunities for international development and humanitarian projects worldwide.

DIRECTORY OF FUNDING OPPORTUNITIES FOR WOMEN-LED ORGANIZATIONS (WLO)

- **UN Women**: UN Women is the United Nations entity dedicated to gender equality and the empowerment of women, advocating for women's rights and supporting programs to eliminate discrimination and violence globally. UN Women provides also grants for gender-focused initiatives and projects.
- **UN Trust Fund to End Violence against Women**: Awards grants to initiatives demonstrating that violence against women and girls can be systematically addressed, reduced, and, with persistence, eliminated.
- **Women's Peace and Humanitarian Fund**: Supports local and grassroots women's civil society leaders and their organizations in conflict and crisis settings worldwide.
- **Global Fund for Women**: Offers flexible funding and support to gender justice organizations worldwide.
- **MamaCash**: Organization that supports women, girls, and trans and intersex people in their fight for their rights. It offers grants through different funds, as well as accompaniment support to help grantee-partners as they obtain, improve, and retain the skills, knowledge, tools and equipment needed to fulfill their missions.
- **She Wins – Rapid Response Fund (RFF)**: A global funding mechanism administered by the NGO "Search for Common Grounds" designed to respond to women-led organizations who need rapid support to advance peace in changing contexts.
- **Urgent Action Fund for Feminist Activism**: Provides fast, flexible support to women, trans and non-binary activists so they can respond to unexpected risks and opportunities. The fund offers both security grants, available to activists whose safety and security are at risk, and opportunity grants, in which efforts focus on advocacy, awareness raising, influencing policy, and changing public discourse.
- **L'Oréal Fund for Women**: Supports frontline organizations in their efforts to help women get out of poverty, prevent domestic, sexual and gender-based violence against women.
- **Awid**: A directory of funding opportunities compiled by AWID, an organization dedicated to gender justice and women's human rights. It features over 200 funders, with a primary focus on gender justice and women-led initiatives, many of whom also

fund work in areas such as community-led responses, support for displaced populations and racial justice.

TOOL: FUNDING OPPORTUNITY MAPPING TEMPLATE

To effectively manage funding opportunities, prioritize them, and plan appropriate follow-up actions, you can use a dedicated funding mapping template. This tool helps streamline the identification, tracking, and evaluation of opportunities, ensuring a more strategic and organized approach to resource mobilization.

Funding source	Type (grant/partnership)	Amount	Eligibility criteria	Deadline	Key contacts	Notes / Follow-up actions

4. CREATE A FUNDING ACTION PLAN AND MAKE EFFECTIVE APPLICATIONS

After mapping potential funding opportunities, the next step is to identify those that best align with your organization's funding goals and prepare to submit strong and compelling applications to funders.

A brief "Funding action plan" can be a valuable tool in this process, as it enables your organization to approach fundraising with purpose, ultimately maximizing the impact of your efforts. This plan should build upon insights gathered in the previous steps - financial needs assessment, funding goal definition, and opportunity mapping - allowing for a strategic match between the identified opportunities and the specific needs and priorities of the organization. The "Funding action plan" should also outline the next practical steps to pursue funding, guiding the proposal preparation process and ensuring follow-up and tracking of the application. In case the application proves successful, the plan might even include monitoring and evaluation indications, as many funders require reporting on the use of funds and project outcomes to ensure transparency and accountability.

Finally, building on the "Funding action plan", the process continues with drafting your applications. It is essential to craft effective applications that align with the priorities and expectations of each specific funder, so that the applications demonstrate how your organization's work addresses funders' goals while showcasing your capacity and credibility as a reliable partner.

TOOL: FUNDING ACTION PLAN

This tool serves as a structured framework to help you organize and track your funding efforts.

1. FUNDING GOALS

- What are the main financial priorities?

- What specific programs or expenses need funding?

2. IDENTIFIED FUNDING OPPORTUNITIES

- Funding source: _____
- Type of funding: _____
- Application deadline: _____
- Contact/donor information: _____

3. STEPS TO PURSUE FUNDING

- Key actions required:

- Assigned team member(s): _____
- Timeline: _____

4. PROPOSAL PREPARATION

- Application requirements:

- Documents needed:

5. FOLLOW-UP & TRACKING

- Submission date: _____
- Expected response date: _____
- Next steps/adjustments: _____

6. MONITORING & EVALUATION

- How will the impact of the funding be measured?

- Reporting Requirements:

TOOL: FUNDING APPLICATION TIP SHEET

This tool is designed to help your organization create compelling, tailored funding applications that effectively communicate its mission, goals, and the impact of its work. By following these steps and answering guiding questions, you can ensure your proposals align with donor priorities and stand out in competitive funding environments.

1. **UNDERSTAND THE DONOR'S PRIORITIES**
    - **Questions to ask:**
        - What are the donor's primary goals and focus areas and how does your organization's mission align with these priorities?
        - What specific outcomes is the donor looking to achieve through their funding?
    - **Action:** Research the donor thoroughly by reviewing previous projects funded and any available reports or publications.

2. **DEVELOP A CLEAR AND COMPELLING NARRATIVE**
    - **Questions to ask:**
        - What problem is your organization addressing, and why is it critical?
        - How does your project provide a unique or effective solution to this problem?
        - What evidence (data, testimonials, case studies) supports your approach?
    - **Action:** Write a concise story that connects the donor's priorities with the needs your organization addresses, showing the tangible impact of their support.

3. **OUTLINE MEASURABLE GOALS AND OBJECTIVES**
    - **Questions to ask:**
        - What specific outcomes will the project achieve, and how will you measure them?
        - What indicators will you use to track progress and demonstrate success?
    - **Action:** Use SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives to make your proposal credible and results-oriented.

4. **CREATE A TRANSPARENT AND REALISTIC BUDGET**
    - **Questions to ask:**
        - What are the exact costs associated with this project?
        - How do these costs break down?
    - **Action:** Present a clear and detailed budget that justifies every expense and demonstrates responsible financial planning.

5. **DEMONSTRATE ORGANIZATIONAL CAPACITY AND CREDIBILITY**
    - **Questions to ask:**
        - What evidence shows your organization's ability to deliver on the proposed project?
        - What partnerships, past successes, or unique strengths can you highlight?
    - **Action:** Include relevant achievements, partnerships, references, or endorsements to build trust and show your capacity to manage the funds responsibly.

5. REPORTING AND COMMUNICATING IMPACT TO DONORS

Securing funding is only the beginning of a long-term relationship with funders. To build trust and increase the chances of future support, RLOs must ensure transparent and effective communication about how resources are being used and what impact they are generating. Funders typically want to see measurable results that demonstrate their contributions have a tangible impact, making well-prepared reports a fundamental part of maintaining credibility and strengthening partnerships.

REGULAR UPDATES

Some funders may appreciate consistent and proactive communication, not just at the end of a project but throughout its implementation. Regular updates help reinforce their confidence in your work and ensure that they stay informed about progress, successes, and challenges in real-time. Depending on the funder's preferences, these updates can take the form of:

- **Periodic reports**: e.g. quarterly or mid-term reports, summarizing achievements and ongoing work.
- **Email updates:** highlighting key events and issues.
- **Informal check-ins:** through meetings or calls to keep funders involved.
- **Participatory methods**: some funders are increasingly interested in mutual learning and exchange, rather than one-way reporting. This could include creating opportunities for mutual sharing of ideas or even reciprocal exchanges where both sides share needs and offers.
- **Newsletters or social media updates:** where appropriate and agreed with funders, these channels can showcase progress and impact to a broader audience.

REPORTING

Many funding agreements include specific reporting obligations, outlining required content, formats, and deadlines. Since adherence to reporting guidelines is often an explicit contractual obligation, a well-structured financial strategy must fully integrate and prioritize reporting, ensuring it is neither overlooked nor underestimated.

TOOL: THE "8 STEPS FOR SUCCESSFUL REPORTING" GUIDE

To support organizations in preparing high-quality reports, UNHCR's Multi-Country Office in Hungary developed the "8 Steps for Successful Reporting" tool. This best practice guide breaks down reporting into a step-by-step process, providing RLOs with a structured approach to produce clear, well-organized, and impactful reports that meet funder expectations.

GOOD PRACTICES FROM THE FIELD

From UNHCR MCO Hungary

6. PARTNERING WITH UNHCR: EXPLORING FUNDING OPPORTUNITIES AND UNDERSTANDING OUR WORK

UNHCR actively supports refugee-led organizations by fostering an environment where they have the space, recognition, and institutional support needed to strengthen their organizational capacity and expand their impact. Beyond advocacy initiatives, UNHCR's commitment to supporting RLOs extends to creating direct channels for collaboration between UNHCR and RLOs: whether through direct funding mechanisms or other formal or informal alliances, UNHCR seeks to reinforce the influence of RLOs, ensuring that they play an active role in shaping protection, assistance, and solutions strategies for displaced and stateless communities.

This section outlines how RLOs can collaborate with UNHCR, whether as allies, grant recipients, or funded partners and offers general insights into UNHCR's mandate and structure, helping RLOs better understand its role and operational framework.

HOW CAN RLOS WORK WITH UNHCR?

BECOMING AN ALLY

UNHCR seeks to build active relationships with RLOs, enhancing their contributions through information exchange and collaboration. Organizations that are led by refugees represent an opportunity for UNHCR to engage with refugees in a more strategic way and to promote refugees as active agents of change within their communities and in the wider society. A memorandum or letter of understanding (MoU/LoU) can be used by an operation and a refugee-led organization to document their cooperation at the country, regional, or global level, though it does not involve funded relationships or implementation arrangements. Introducing your organization to UNHCR, outlining its activities and objectives, can be a valuable first step toward building collaboration.

GRANT AGREEMENTS

While UNHCR has traditionally partnered with NGOs, INGOs and governments through funded partnerships, a new modality of partnering, the "Grant Agreement", was introduced in 2021 specifically to make working cwith refugee-led and community-based organizations easier by reducing the requirements for partner organizations. Grant agreements empower RLOs to lead community projects, strengthen capacity, and promote self-reliance, with funding capped at USD 12,000 per partner annually. The grant may be managed through the organization's bank account or by an individual on its behalf, depending on its legal status. UNHCR also enters into grant agreements with community-based organizations that are not refugee-led as long as their stated objectives and activities focus on responding to the needs of forcibly displaced and stateless people, as well as the communities hosting them. A refugee-led organization should meet a number of criteria to be eligible for a grant agreement, including criteria concerning adherence to specific ethics standards *(→ see also modules 5 and 6 to learn more about UNHCR policies on ethics and PSEA*). In particular, an RLO should:

- Commit to a Code of Conduct (see The UNHCR Code of Conduct Template for Grant Agreements) and require all staff to sign it, unless RLO's Code of Conduct is already in place and signed,
- Provide or attend training on fraud prevention, conflict of interest, and protection from sexual exploitation and abuse (SEA).

- Establish reporting mechanisms for misconduct and SEA or commit to doing so with UNHCR's support.

Selection processes for grant agreements are not standardized and may vary between UNHCR operations. If a formal selection process is implemented, UNHCR will issue a Call for Expression of Interest, inviting prospective partners to submit a Grant Agreement Concept Note.

Once an RLO is selected, the Grant Agreement Template is jointly developed with UNHCR before signature. Subsequently, UNHCR will monitor the progress of the implementation of the project and a joint Grant Agreement Final Narrative Report will conclude the project.

WORKING WITH AN UMBRELLA ORGANIZATION

An umbrella organization can be a local, national, or international NGO that works with refugee-led organizations as part of a UNHCR-funded project. In such cases, refugee-led organizations typically sign a Memorandum of Understanding (MoU) with the umbrella organization but do not have any direct contractual relationship with UNHCR. Building refugee-led organizations' capacities and encouraging their growth is at the center of such partnerships, where results are measured both in terms of improvement in the lives of refugees and in terms of organizational and capacity growth of the RLO. While monitoring and reporting requirements are defined by the umbrella organization they traditionally involve also UNHCR.

BECOMING A FUNDED PARTNER

A competitive selection process is compulsory to identify UNHCR's partners who will engage in a project with a value above 100,000 USD. The competitive partner selection process begins with a call for expression of interest published on the United Nations Partners Portal (UNPP), detailing project scope, criteria, and partner specialization. Organizations submit concept notes showcasing their value, and UNHCR ensures transparent selection, based on predefined criteria. In addition to assessing technical expertise, UNHCR evaluates prospective partners' capacities in the following areas:

- Protection against sexual exploitation and abuse (PSEA)
- Internal control and financial management capacities
- Data protection and information security standards
- Procurement (only when the project entails a procurement component)

A funded partnership entails specific terms, conditions as well as several contractual documents, including:

- **A Partnership Framework Agreement (PFA)**: Document defining the terms and conditions of the partnership with UNHCR. The PFA describes the purpose and scope of the partnership for which the partner was selected and can have a multi-year duration, typically aligned with the operation's strategic plan that lasts three to five years. It does not include any financial commitment.

- **A Project Workplan**: Document subject to a PFA, for partnerships on an annual basis, stipulating the responsibilities, obligations and accountabilities of the participating parties for undertaking specific activities, including budget and results targets. It includes a financial commitment.

- **A Data Protection Agreement**: When the funded partner processes the personal data of forcibly displaced and stateless persons in the framework of the project, an additional agreement is necessary. This agreement includes details about the roles

and responsibilities of the parties with respect to the processing of personal data and the safeguards that will be put in place.
Partners signing a PFA are typically requested to use UNHCR's platform Aconex for the management of the project and are strongly engaged and consulted throughout UNHCR's Programme cycle.

Finally, UNHCR applies a risk-based approach to determine the frequency of reporting and monitoring exercises. At minimum, for a 12-month project, a funded partner will be requested to share 3 financial reports which are subject to verification by UNHCR project control function, as well as a result (indicators) and narrative report covering the entire period. For most projects, additional mid-year reporting is required at the discretion of each UNHCR operation.

To learn more about UNHCR's funded partnerships, refer to the UNHCR Programme Handbook for Partners.

PARTICIPATING IN OTHER UNHCR FUNDING OPPORTUNITIES

Beyond formal partnerships and grant agreements, UNHCR continuously explores new ways to collaborate with RLOs, including through dedicated funding initiatives such as the Refugee-Led Innovation Fund.

The Refugee-Led Innovation Fund: The Fund provides holistic support – combining financial resources, mentoring, and other expertise – directly to refugee-led organizations, to enable them to design and deliver new interventions that have a lasting positive impact on their communities.

The Fund accepts applications from both registered and unregistered organizations led by people with lived experience of forced displacement, including refugees, asylum-seekers, the internally displaced, returnees, and stateless people who are recognized within their communities due to their past significant contributions. Applications from organizations led by underrepresented groups like LGBTIQ+ persons, women, people with disabilities and indigenous people are particularly encouraged and supported.

Eligible RLOs can apply for up to $45,000 USD to implement community-driven projects. In addition to financial assistance, selected organizations receive programme and project management support, technical support and coaching, peer-to-peer networking and capacity-building opportunities.

The application process involves a two-stage selection, starting with an expression of interest, followed by a full proposal for shortlisted candidates. UNHCR's Innovation Service and country offices provide support throughout the process, ensuring that RLOs have the tools they need to bring their ideas to life and create sustainable impact.

UNDERSTANDING UNHCR'S MANDATE AND WORK

OUR MANDATE

UNHCR's 1950 Statute mandates the organization to provide international protection and seek durable solutions for refugees. These responsibilities are intertwined, ensuring that displaced persons have access to their rights and long-term opportunities for stability, while always prioritizing the rights and needs of individuals. UNHCR works to promote refugee rights by encouraging governments to adopt and implement relevant conventions, ensuring fair asylum processes, and protecting refugees from forcible return to unsafe countries. It advocates for equal treatment under international standards, facilitates durable solutions like voluntary repatriation or local integration, supports reintegration efforts, and safeguards refugees' physical security while promoting family reunification and long-term stability.

STRUCTURES AND ROLES

When collaborating with UNHCR, RLOs may interact with UNHCR colleagues pertaining to several units, including:

- **Protection**: defines partner selection criteria, supports project design, and monitors implementation.
- **Programme**: Oversees planning, budgeting, and resource allocation in collaboration with partners.
- **Project Control**: Ensures effective project management through financial oversight and verification.

UNHCR manages partnerships through a Multi-Functional Team (MFT), a participatory approach that brings together experts from different functional areas of the organization (such as Protection, Programme and others) to assess protection needs and design inclusive responses. Depending on the task, and for broader initiatives, MFTs may also involve partners such as NGOs and donors.

THE UNITED NATIONS PARTNERS PORTAL (UNPP)

The UNPP is a digital platform where UN agencies publish partnership opportunities for NGOs, community-based organizations, refugee-led organizations, and academic institutions. By registering, organizations become eligible to apply for UNHCR partnership selection processes and can access guidelines and templates from different UN agencies. Grant Agreement partners are encouraged to register on the UNPP, though it's not a prerequisite to signing a UNHCR Grant Agreement.

UNHCR PROGRAMME CYCLE - PLAN-GET-SHOW

UNHCR's multi-year programme cycle is built around a results-based management approach (RBM) that focuses on achieving measurable results and impact. It involves setting clear objectives, monitoring progress and indicators, collecting and analyzing data, and using feedback to inform decision-making.

The cycle is composed of three stages:

- **Plan for Results (PLAN)**: "PLAN for Results" is the first phase in UNHCR's results-based management cycle, taking place between January and April of each year. Its purpose is to outline the desired changes in the lives of forcibly displaced and stateless persons and formulate how these changes will be achieved. In this phase, operations

prepare context-specific multi-year strategies that articulate the protection and solutions UNHCR intends to deliver in collaboration with partners.

- **Get Results (GET)**: “GET Results” constitutes the second phase within UNHCR's programme cycle and takes place continuously throughout the strategy's duration. In this phase, operations prioritize resource-efficient actions to transform strategies into tangible outcomes, aligned with UNHCR's budget based on needs. The year before implementation, UNHCR’s operations devises an implementation strategy collaboratively with partners and affected communities. The operations then execute the activities either directly or in partnership with various stakeholders, including partners and contractors. They also monitor results to gauge progress and strategy fulfillment, informing evidence-based adjustments as needed.

- **Show Results (SHOW)**: “SHOW Results” is the third and last phase of the results management cycle, interconnecting with the preceding “PLAN for Results” and “GET Results” phases, taking place between January and April each year, in parallel to the PLAN for Results phase. It generates information and insights on progress towards protection and solutions for forcibly displaced and stateless persons and identifies if a course correction of strategy implementation is necessary. In this phase, operations make use of monitoring data and other evidence to assess how implementation has evolved across the areas of the strategy. Together with other relevant stakeholders, operations analyze progress, achievements, and lessons learned and identify areas for reprioritization or adjustments. Operations also conduct annual project closure, ensuring sound fiscal management and accountability through partnerships. Closure involves evaluations, performance verifications, and financial audits following a risk-based approach.

To learn more about UNHCR’s results-based approach you can access the ad-hoc digital learning course “Course for Partners: an Introduction to UNHCR’s Results Based Management Approach”, available on the United Nations Partner Portal.

MODULE 5: ETHICAL STANDARDS AND CODE OF CONDUCT

Maintaining an organization's integrity starts with establishing a strong framework of ethical standards. Clearly defined standards foster a culture of transparency and accountability: they not only provide direction for an organization's actions and management but also empower staff to make ethical decisions that align with its mission and values.

To establish a structured framework, core values and fundamental principles can be consolidated into a "Code of Conduct" (CoC), a document that organizations use to uphold and promote ethical standards, requiring their members, staff, and affiliates to sign as a commitment to adherence.

Adopting a Code of Conduct can be particularly important for RLOs, especially considering the complexity of their roles within their communities and the challenging operational contexts in which they often operate. Many RLOs are engaged in humanitarian aid or work directly with program participants: settings where RLO staff may hold positions of power in relation to the people they serve, making it essential to establish clear obligations to prevent any misuse of authority. A well-structured Code of Conduct ensures the protection of the dignity, rights, and welfare of beneficiaries and staff while providing mechanisms to address potential abuses effectively.
Additionally, a Code of Conduct acts as a powerful statement to beneficiaries, partners, donors, and other stakeholders, demonstrating RLOs' commitment to their mission and their dedication to upholding the highest standards of ethical and professional conduct, ultimately reinforcing RLOs' credibility and reputation.

In light of this, this module aims to:

1. Provide useful tools and resources to develop a Code of Conduct that best represents your organization's mission and values (Section 1).
2. Support your organization in evaluating and monitoring the implementation and enforcement of the Code of Conduct (Section 2).

1. CREATING A CODE OF CONDUCT

Developing a Code of Conduct may seem a daunting task, particularly when it comes to deciding which values and principles to include and determining how these translate into actionable commitments.

However, this task becomes more approachable when considering that organizations in the humanitarian and development sectors, despite their unique missions and objectives, often align on shared goals and values. Drawing on the experience and ethical standards set by other actors in the field can, indeed, be a powerful source of inspiration for your organization, providing a roadmap for crafting your own Code of Conduct.

In particular, the United Nations has dedicated significant effort to developing a comprehensive ethical framework that fully encapsulates its organizational culture, firmly rooted in the four core values of Inclusion, Integrity, Humility, and Humanity. Documents such as the UN Values and Behaviours Framework, or UNHCR's Code of Conduct can provide valuable guidance for RLOs aiming to establish or strengthen their own ethical standards, while also facilitating alignment with UN frameworks and policies.

With this context in mind, a comprehensive Code of Conduct can incorporate core principles such as respect for human rights, non-discrimination, integrity, confidentiality, and prevention of misconduct (like abuse of authority, sexual exploitation and abuse, fraud, corruption etc.). Among these principles, Protection from Sexual Exploitation and Abuse (PSEA) stands out as a particularly critical area, for which the United Nations has developed a distinct and detailed framework.

While PSEA-related issues will be explored in greater depth in the next module of the toolkit (→ *see module 6*), it is worth emphasizing here that a comprehensive Code of Conduct should include clear and explicit commitments to PSEA, and that, given the significance of this issue, RLOs may also choose to develop a separate, standalone Code of Conduct dedicated exclusively to PSEA.

RESOURCES: UN AND UNHCR ETHICAL FRAMEWORKS

These resources offer insights into UN/UNHCR ethical frameworks and can support your organization in developing or enhancing your ethical standards in alignment with UN policies:

- UN Values and Behaviours Framework*:* This framework forms the basis of the UN organizational culture, setting values and behaviors that represent the Organization and inform all its processes (including workforce planning, recruitment, learning and performance management).
- The UNHCR Code of Conduct and Explanatory Notes*:* This Code of Conduct sets the ethical and professional standards that UNHCR staff commit to uphold.
- The UNHCR Code of Conduct template for Grant Agreements: A pre-established Code of Conduct that must be signed by organizations entering into Grant Agreements with UNHCR *(→ to learn more about Grant Agreements with UNHCR, see module 4, section 6*)

TOOL: TRANSLATING CORE VALUES AND ETHICAL PRINCIPLES IN COMMITMENTS

This tool is designed to offer a broad, non-exhaustive list of ethical principles and corresponding commitments that can be incorporated into a Code of Conduct.

Humanity / Respect for Human Rights		- Respect and promote the fundamental human rights of all. - Act with empathy and compassion, prioritizing the dignity and well-being of those served.
Inclusion / Respect for Diversity / Non-discrimination		- Treat all persons with respect and dignity, regardless of age, culture, disability, ethnicity, gender, gender identity, gender expression, geography, grade, language, nationality, racial identity, religion, sex, sex characteristics, sexual orientation, social origin or any other aspect of identity.
Integrity		- Act ethically and professionally and take prompt action in case of witnessing unprofessional or unethical behaviour.
Including:	**Protection from Sexual Exploitation and Abuse (PSEA)**	- Prevent, oppose and combat all forms of sexual exploitation and abuse of beneficiaries.
Including:	**Prevention of Fraud**	Refrain from conduct that may result in fraud, corruption, or embezzlement.
Including:	**Prevention of Conflicts of Interest**	- Refrain from conduct that could be perceived as presenting a conflict of interest, could adversely reflect on the organization, or be seen as incompatible with the aims of the organization.
Including:	**Prevention of abuse of authority**	- Never abuse authority, position or influence by withholding protection, humanitarian assistance or services to forcibly displaced and stateless people who receive or who may in the future receive services.
Including:	**Confidentiality**	- Never disclose any confidential information about the forcibly displaced and stateless people who receive assistance or the organization.
Including:	**Observance of the law**	- Comply with all applicable laws, ordinances, rules and regulations when performing work-related activities.
Humility		- Contribute to building a harmonious workplace based on team spirit, mutual respect and

	understanding, demonstrating self-awareness and willingness to learn from others

2. IMPLEMENTING A CODE OF CONDUCT

Implementing a Code of Conduct is more than just drafting a document; it requires deliberate effort to ensure the organization's commitment translates into meaningful action. Making a CoC effective involves fostering awareness, building capacity through training, and creating systems to ensure accountability and compliance. These processes can be challenging, as they demand consistent engagement, clear communication, and mechanisms to monitor progress and address gaps.

TOOL: CHECKLIST FOR MEASURING IMPLEMENTATION OF THE CODE OF CONDUCT

This tool provides practical steps to assess how well your organization is implementing the Code of Conduct (CoC) in three key areas: Awareness and Commitment, Training & Capacity Building, Compliance and Reporting Mechanisms.

1. Awareness and Commitment

Goal: Ensure all members, staff, and volunteers are familiar with and committed to the Code of Conduct.

✅ **Checklist**:

- ☐ Does the organization provide the CoC to all members, staff, and volunteers upon onboarding and do they sign specific documents to confirm their commitment to the CoC?
- ☐ Are posters or materials summarizing the CoC displayed in accessible areas for both staff and recipients (e.g., offices, community centers)?
- ☐ Are regular staff meetings held to discuss the CoC and its importance in daily operations?
- ☐ Have surveys or feedback forms been used to measure staff and volunteer understanding of the CoC principles and to gather their input and suggestions?

2. Training and Capacity Building

Goal: Provide ongoing training to reinforce ethical practices and build capacity.

✅ **Checklist**:

- ☐ Are CoC training sessions conducted for all new members, staff, and volunteers?
- ☐ Is there a regular schedule (e.g., quarterly, annually) for refresher training on CoC principles?
- ☐ Are training materials updated regularly to address emerging challenges or ethical dilemmas?
- ☐ Are interactive methods (e.g., role-playing, case studies, group discussions) used to ensure engagement and understanding?
- ☐ Do staff and volunteers provide feedback on the usefulness of training programs?

3. Compliance and Reporting Mechanisms

Goal: Establish mechanisms to ensure compliance with the Code of Conduct, including systems for reporting violations.

✅ **Checklist**:

- ☐ Is there a person or a team responsible for monitoring compliance with the CoC and handling violations?

- □ Are there channels to report violations of the CoC (e.g. mechanisms to report sexual exploitation and abuse)?
- □ Are staff and beneficiaries informed about channels and modalities to report violations?
- □ Are reporting channels safe, confidential, and accessible to diverse groups within the community, and are there mechanisms to protect those reporting from retaliation?
- □ Are reports of violations tracked, documented, and addressed promptly?

RESOURCES: ENFORCEMENT OF THE CODE OF CONDUCT

When the Code of Conduct is violated by a staff member or a volunteer, it's important to respond with clear and appropriate action to uphold its integrity. There are many ways to do this, and your CoC should include the measures that best fit your structure and needs.

GOOD PRACTICE FROM THE FIELD

From UNHCR Belgium

Below is an example of a possible "Enforcement of the Code of Conduct" section, drawn from the CoC used by the Refugee Committees in Belgium. The Refugee Committees are initiatives supported by UNHCR Belgium to empower refugees and promote a structured dialogue between refugees and Belgian authorities. There are ten Refugee Committees in total, representing different communities, based on nationality and on other characteristics (e.g., women, LGBTIQ+ refugees), coordinated by an Umbrella Refugee Committee that brings them together under a common platform.

You can use this example as inspiration to shape the enforcement section of your own Code of Conduct, adapting it to your organization's context and values.

ENFORCEMENT OF THE CODE OF CONDUCT

The organisation uses a variety of measures to respond to violations of the Code of Conduct:

- **Verbal Warning**: A formal discussion with the staff member or volunteer to address the breach and reiterate the expected standards of conduct. This warning is documented but not added to the individual's permanent record.
- **Written Warning**: A formal written notice that outlines the breach and the consequences of repeated or continued non-compliance. This is added to the individual's file and may include a plan for corrective action.
- **Mandatory Training**: Requiring the individual to attend specific training sessions (e.g., diversity and inclusion, anti-harassment, conflict resolution) to address and rectify the behaviour.
- **Probation**: Placing the individual on a probationary period during which their conduct will be closely monitored. Any further breach during this period could result in more severe sanctions.
- **Formal Apology**: Requiring the individual to issue a formal, written or verbal apology to the affected parties, acknowledging their misconduct and committing to improved behavior.
- **Temporary Suspension**: A temporary removal from duties, with or without pay (for staff), to allow for a full investigation of the breach. This suspension could last from a few days to several weeks depending on the severity of the breach.
- **Demotion**: In cases where the breach involves misuse of authority or failure to uphold leadership responsibilities, the individual may be demoted to a lower position with reduced responsibilities and compensation.
- **Change of Duties**: Reassignment to different duties or roles within the organization, particularly if the breach occurred in a specific area of work.
- **Termination of Volunteer Service**: Ending the individual's volunteer role within the organization. This may occur immediately or after an investigation, depending on the severity of the breach.

- **Dismissal from Employment**: For staff members, this involves termination of employment due to serious breaches of the Code of Conduct. This decision is made following a thorough investigation and consideration of the facts of the case.
- **Permanent Ban from Activities**: Barring the individual from participating in any future events, activities, or projects, effectively severing all ties with the organization.
- **Referral to Authorities**: If the breach involves illegal activities, such as harassment or abuse, the individual may be reported to the relevant legal authorities for further action, including potential prosecution.
- **Public Disclosure**: In cases where the breach has affected a large group or the public, a statement may be issued to address the situation, maintaining transparency and organizational integrity.
- **Reparations or Compensation**: The individual may be required to make reparations or provide compensation to those harmed by their actions, depending on the nature of the breach.

Upon a formal complaint, the person who filed the complaint will be invited for a conversation to discuss the incident(s) and potential action. The person who filed the complaint will also be consulted on the course of action to be followed.

MODULE 6: PROTECTION FROM SEXUAL EXPLOITATION AND ABUSE (PSEA)

The United Nations enforces zero-tolerance for inaction against Sexual Exploitation[4] and Abuse[5] (SEA), recognizing that any acts of SEA perpetrated by UN personnel, partners of the UN or other aid workers, constitute a grave violation of human rights and an abuse of a position of power over a vulnerable population that they have pledged to protect. SEA can result in severe and often irreversible harm to victims. Furthermore, SEA violations erode trust, damage relationships with the communities the UN serves, and eventually undermine the credibility and effectiveness of all humanitarian work.[6]In response, UN agencies, including UNHCR, have collectively taken significant, coordinated action over the years to protect the people we aim to serve from SEA. Within the UN system, the term "PSEA" (Protection from Sexual Exploitation and Abuse) refers to policies and actions designed to prevent and respond to any form of sexual exploitation and abuse by aid workers, ensuring that allegations of SEA are reported and victims are assisted and supported in line with a victim-centred approach.

In addition to staff from UN agencies, compliance with UN PSEA policies is also mandatory for staff from certain entities associated with the UN, such as funded partners, vendors, and contractors. As a result, RLOs that fall under the category of **"funded partners"**[7] are bound by clear and specific obligations on PSEA, as stipulated by the "The United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners" (in short, *UN IP Protocol*) and undergo a dedicated "PSEA Partner Capacity Assessment Process" tailored specifically for UN funded partners.

At the same time, RLOs that are not classified as "funded partners" but are associated with or collaborate with the UN to varying degrees may still be required to adhere to certain UN PSEA standards. This is the case, for instance, of **RLOs entering into Grant Agreements with UNHCR**[8] - a mechanism through which UNHCR financially supports the activities of RLOs, CBOs, and other grassroots organizations (→ *see also module 4 of the toolkit*). Since partnerships based on grant agreements differ from standard partnerships, organizations signing such agreements are not

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[4] *Sexual Exploitation* is "any actual or attempted abuse of a position of vulnerability, differential power, or trust, for sexual purposes, including, but not limited to, profiting monetarily, socially or politically from the sexual exploitation of another". See "The United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners", par. 9.

[5] *Sexual Abuse* is "the actual or threatened physical intrusion of a sexual nature, whether by force or under unequal or coercive conditions. See "The United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners", par. 9.

[6] A collective responsibility: Inter-agency coordination on PSEA 2-pager

[7] UNHCR currently uses the term "funded partners" instead of "implementing partners", which is instead used in other UN agencies and in some official documents such as the "United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners". In the context of this toolkit, "funded partner" is used with the same meaning as "implementing partner" as defined in the Protocol.
The Protocol defines "implementing partner" as "an entity to which a UN office or entity has entrusted the implementation of a programme and/or project specified in a signed document, along with the assumption of responsibility and accountability for the effective use of resources and the delivery of outputs. Implementing partners may include – but are not limited to - government institutions, inter-governmental organizations, and civil society organizations, including NGOs. Implementing partners' subcontractors are subsumed within this definition.".

[8] UNHCR's "Standard Operating Procedures for Grant Agreements" defines "grant agreement" as "a type of partnership with an organization or group that were founded predominantly by individuals with direct lived experience of forced displacement or statelessness, or where individuals hold primary leadership roles, and whose stated objectives and activities focus on responding to the needs of forcibly displaced and stateless people, as well as the communities hosting them. A grant agreement can also be awarded to a community-based organizations from host communities, provided their stated objectives and activities are centered on supporting forcibly displaced and stateless people.".

subject to the same Partners' PSEA capacity assessment process as funded partners. Nevertheless, UNHCR grant agreements include other safeguard components, including PSEA, which are reviewed during the completion of the Eligibility Checklist prior to the Grant Agreement signature.

Finally, even when **RLOs do not have any contractual agreement with UN entities** and are not formally required to adhere to specific PSEA standards, they still have compelling reasons to develop or strengthen PSEA policies: first and foremost because implementing these policies is crucial for protecting the vulnerable populations RLOs serve, while maintaining the trust and credibility of the organization and preserving the integrity of their mission. In addition, adopting PSEA policies ensures alignment with UN standards, which can facilitate potential future partnerships or collaboration between RLOs and UN entities.

Type of relationship between RLO and the UN	PSEA Commitment	Relevant section within this Module
RLOs classified as "Funded Partners" of UN entities	- Commitments on PSEA regulated by the "The United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners". - Undergoing the PSEA Capacity Assessment Process for Funded Partners.	Refer to the following sections within this module of the toolkit: - **Section 1:** PSEA Capacity Assessment Process For Implementing Partners - **Section 3:** PSEA Capacity Strengthening For RLOs
RLOs entering into Grant Agreements with UNHCR	Commitments related to PSEA in the Grant Agreement in the Code of Conduct that the RLOs are required to sign.	Refer to the following sections within this module of the toolkit: - **Section 2**: PSEA for RLOs Entering Into Grant Agreements With UNHCR - **Section 3**: PSEA Capacity Strengthening for RLOs
RLOs with no contractual agreement with the UN	No mandatory standards, but can autonomously develop their own PSEA policies, also utilizing or adapting UN material.	Refer to the following section within this module of the toolkit: - **Section 3**: PSEA Capacity Strengthening for RLOs

Given the significant investment by the UN and other humanitarian actors in PSEA – resulting in a wealth of specialized materials, dedicated platforms, and even ad-hoc PSEA toolkits - this module takes a slightly different approach: rather than attempting to list all relevant tools, which would be impractical and risk duplicating existing resources, it focuses on equipping RLOs with the knowledge to effectively navigate the PSEA framework, highlighting key platforms and channels where relevant resources and tools can be accessed and providing guidance on how to engage with such material effectively.

In particular, this module:

- Provides a brief overview of the PSEA Partner Capacity Assessment Process for UN funded partners, highlighting key documents and resources to navigate the “PSEA Module” on the UN Partner Portal (Section 1)
- References essential resources on PSEA for RLOs entering into Grant Agreements with UNHCR (Section 2)
- Provides an extensive list of dedicated platforms and toolkits where RLOs can access resources and tools to develop and strengthen PSEA policies within their organizations (Section 3).

1. PSEA PARTNER CAPACITY ASSESSMENT PROCESS FOR FUNDED PARTNERS

The United Nations system mandates all its funded partners to comply with UN standards on SEA. In this regard, the *United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners* stipulates that "the UN does not partner with entities that fail to address sexual exploitation and abuse through appropriate preventive measures, investigation and corrective action" and that "such failures shall constitute grounds for the termination of any cooperative arrangement with the UN".[9]

To uphold these standards, participating UN entities, including UNHCR, UNFPA, UNICEF, WFP, and WHO, conduct a comprehensive screening process before establishing cooperative arrangements with funded partners, assessing the partner's capacity to prevent or mitigate SEA risks and ensuring the implementation of appropriate risk mitigation measures, such as capacity building and ongoing monitoring[10], and support partners in strengthening their capacities where gaps are identified.

The objective of this process is not to impose undue burdens on partners or exclude them from collaborating with the UN. Instead, it aims to strengthen their capabilities in addressing SEA and protect the populations the UN serves.[11]

THE 8 CORE STANDARDS AND THE CAPACITY OF THE PARTNER

The PSEA Assessment of funded partners covers 8 core standards, which the partner should meet to have full capacity on PSEA.[12]

Core Standards	Assessment criteria
Core Standard 1 Organizational Policy	The partner has a **PSEA policy document including the prohibition of SEA** (code of conduct or similar).
Core Standard 2 Organizational Management - Sub-contracting	The **partner's contracts and partnership agreements include a standard SEA clause** requiring sub-contractors to adopt policies that prohibit SEA and to take measures to prevent and respond to SEA.
Core Standard 3 Human resources system	There should be a **systematic vetting procedure** in place for job candidates through screening. This must include, at minimum, **reference checks** for sexual misconduct and a **self-declaration** by the job candidate, confirming that they have never been subject to sanctions (disciplinary, administrative or criminal) arising from an investigation in relation to SEA, or left employment pending investigation and refused to cooperate in such an investigation.

[9] "United Nations IP Protocol" par. 3.
[10] "United Nations IP Protocol" par. 14.
[11] PSEA Module User Guide CSO Partner members
[12] See also the document "Operationalization of the UN Protocol on Allegations of Sexual Exploitation and Abuse involving Implementing Partners", which indicates the minimum requirements needed under each core standard for it to be successfully met.

Core standard 4 Mandatory trainings	The partner holds or participates in **mandatory trainings (online or in-person) for all personnel** on PSEA and relevant procedures.
Core standard 5 Reporting	The partner **has mechanisms and procedures** for personnel, beneficiaries and communities, including children, **to report SEA allegations** that comply with core standards for reporting.
Core standard 6 Assistance and referrals	To be consistent with the UN IP Protocol and the UN Victim Assistance Protocol, the partner has **a system to refer SEA victims** to locally available support services, based on their needs and consent.
Core standard 7 Investigation	The partner has a **process for investigation** of allegations of SEA and can **provide evidence**. This may include a referral system for investigations where in-house capacity does not exist.
Core standard 8 Corrective measures	The partner **has taken appropriate corrective action** in response to past SEA allegations, if any.

In the assessment process, the partner first self-assesses its capacity related to all 8 core standards in the PSEA Module on the UNPP and uploads the supporting documents, and then the UN entity rates the PSEA capacity of the partner, determining which core standards are met.

The number of core standards met by the partner reflects the partner's current PSEA capacity, as follows:

Total Score	PSEA Organizational Capacities
8	**Full capacity**: Meets all standards
6-7	**Medium capacity**: Partner meets most core standards
5 or fewer	**Low capacity**: Partner meets five or fewer core standards.

When a UN entity identifies that a partner has medium or low capacity, it engages with the partner to jointly develop a Capacity Strengthening Implementation Plan (CSIP) aimed at addressing the gaps revealed in the assessment and related to 1 or more of the 8 core standards.

THE "PSEA MODULE" ON THE UN PARTNER PORTAL

The whole capacity assessment of funded partners is conducted using a standardized tool developed through a collaborative process with United Nations entities and partners, the "PSEA Module", available on the UN Partner Portal (UNPP).

The UNPP serves as the official platform used by the United Nations to conduct the PSEA Assessment Process for funded partners. Official material developed by the "UN Working Group on supporting the implementation of the PSEA IP Protocol" is accessible in the platform's "Resources"

section, which is regularly updated by the Working Group. Part of this material is available in multiple languages, including English, French, Spanish, Portuguese, and Arabic.

RESOURCES: KEY DOCUMENTS ON PSEA FOR UN FUNDED PARTNERS

For a deeper understanding of PSEA policies for UN Funded Partners, the key documents to consult are:

- **United Nations Protocol on Allegations of Sexual Exploitation and Abuse Involving Implementing Partners**:
  The Protocol outlines requirements of the United Nations, when working with funded partners, to ensure adequate safeguards and appropriate action related to SEA.

- **Operationalization of the UN Protocol on Allegations of Sexual Exploitation and Abuse involving Implementing Partners**:
  This document provides guidance to partners on how to successfully complete the self-assessment. It also indicates the minimum requirements needed under each core standard for it to be successfully met, providing tips and useful resources.

RESOURCES: NAVIGATING THE UN PARTNER PORTAL AND THE PSEA MODULE

Logo of the UNPP

Key resources for Funded Partners to navigate the UNPP portal and the PSEA Module include:

- **PSEA Module User Guide CSO Partner members (ENG – FR – ES – PR – RU – AR)**:
  This manual provides step-by-step instructions for partners on how to use the PSEA module of the UN Partner Portal.

- **PSEA Module training webinar recordings and slides (Multilanguage)**: In addition to the guide, these webinars and slides offer a comprehensive walkthrough of the PSEA Module (Multilanguage).

- **UN Partner Portal Quick Guides**:
  Offering technical guidance on navigating the UNPP website, including:
  - "How to Register on the UNPP" (Video)
  - "How to Sign in to the UNPP" (Video)

2. PSEA COMPLIANCE FOR RLOS ENTERING INTO GRANT AGREEMENTS WITH UNHCR

RESOURCES: KEY DOCUMENTS

UNHCR Grant Agreements explicitly incorporate commitments to PSEA, which are outlined in the following document:

- Grant Agreement Contract: The Grant Agreement Contract signed by the Partner outlines specific obligations related to PSEA, including: the responsibility to refrain from all forms of misconduct (including SEA); the obligation to take all reasonable measures to prevent and address misconduct; the duty to report any incidents of misconduct; the necessity of appointing a person or a team responsible for PSEA within the organization; the commitment to ensure that both members of the organization and the person/team responsible for PSEA receive adequate training on PSEA.

- The UNHCR Code of Conduct template for Grant Agreements: A pre-established Code of Conduct that must be signed by Partners entering into Grant Agreements with UNHCR, including its members and other individuals involved in conducting activities under the Grant Agreement. A significant part of the commitments is related to PSEA.

3. PSEA CAPACITY STRENGTHENING FOR RLOS

UN agencies and NGOs have developed a wide range of materials and tools aimed at strengthening organizational capacity on PSEA. While most resources are specifically tailored for UN funded partners, many can also be useful for other stakeholders interested in developing or enhancing their PSEA policies, including RLOs that fall outside the "funded partners" category.

RESOURCES: OVERALL ORGANIZATIONAL IMPROVEMENT ON PSEA

UNPP GENERAL RESOURCES

The UNPP "Resources" section provides an online repository with general resources for overall organizational improvement on PSEA. Key resources include:

- UNICEF PSEA Toolkit for partners (ENG – FR – ES – AR – POL):
  Including a set of practical tools, such as sample forms, templates, and checklists.
- CRS (Catholic Relief Services) Strengthening Partners in Protection Against Sexual Exploitation and Abuse Toolkit (ENG – FR): Providing both training tools and program implementation tools.

ADDITIONAL RESOURCES

Beyond the UNPP, consider also consulting these additional resources:

- Safeguarding Resource and Support Hub: The Safeguarding Resource and Support Hub (RSH) is a programme designed to help aid organizations strengthen their safeguarding policies and practices against Sexual Exploitation, Abuse, and Sexual Harassment. It offers a free, multilingual Online Hub (in English, Arabic, French, and Swahili) with several resources.
- Resources from the CHS Alliance: The CHS Alliance is a global network of over 200 humanitarian and development organizations working to improve the quality and accountability of aid, including efforts to prevent and address SEA. It offers resources, tools, and guidance with a focus on victim-centered approaches.

RESOURCES AND TOOLS FOR IMPROVEMENT ON CORE STANDARDS

In addition to general resources, the UNPP offers targeted tools and resources for capacity strengthening on each Core Standard, organized in dedicated sections:

- UNPP resources and tools - Core Standard 1 - Organisational Policy
- UNPP resources and tools - Core Standard 2 - Organisational Management
- UNPP resources and tools - Core Standard 3 - Human Resources
- UNPP resources and tools - Core Standard 4 - Mandatory Training
- UNPP resources and tools - Core Standard 5 - Reporting
- UNPP resources and tools - Core Standard 6 - Assistance and Referrals
- UNPP resources and tools - Core Standard 7 - Investigations:
  This section also includes material developed by UNHCR:
  - UNHCR - Toolkit on Investigating Allegations of SEA for Partners
  - UNHCR - E-learning course on Investigating Allegations of SEA for Partners (ENG - ES - FRA - AR)

TOOL: TIPSHEET ON SURVIVOR-CENTRED APPROACH

While many tools are already available on PSEA, adapting existing resources or creating new ones can be incredibly valuable for addressing the unique challenges and issues that may arise in specific operational contexts.

GOOD PRACTICES FROM THE FIELD

From UNHCR Moldova

A good example in this sense comes from UNHCR Moldova, which, in the framework of the “Regional Refugee Response for the Ukraine Situation”, developed a tip sheet to guide aid workers in applying a survivor-centred approach when handling SEA incidents.

The tip sheet is designed to be quick, practical, and easy to use, making it an ideal tool not only for experienced personnel but also for volunteers and less-experienced team members in your organization.

Regional Refugee Response for the Ukraine Situation

UNHCR The UN Refugee Agency

GBV Sub-Working Group and PSEA Task-Force Moldova

Tip sheet on applying a survivor-centred approach to handling of SEA incidents, including assistance to victims

Understanding the differences between GBV and SEA	
GBV is an umbrella term for any harmful act that is perpetrated against a person's will and that is based on socially ascribed (i.e. gender) differences between males and females. It includes acts that inflict physical, sexual or mental harm or suffering, threats of such acts, coercion, and other deprivations of liberty. These acts can occur in public or in private.[1]	**Sexual Exploitation and Abuse are forms of GBV.** **Sexual Exploitation** means any actual or attempted abuse of a position of vulnerability, differential power, or trust, for sexual purposes, including, but not limited to, profiting monetarily, socially or politically from the sexual exploitation of another. **Sexual Abuse** means the actual or threatened physical intrusion of a sexual nature, whether by force or under unequal or coercive conditions.[2]
Consequences	
✓ Physical, health, mental, economic and social. ✓ Feeling of disempowerment. ✓ Isolation from the community and the family. ✓ Fear of exposure. ✓ Fear of not having livelihoods or financial support when leaving a situation of violence.	✓ Physical, health, mental, economic and social. ✓ Feeling of disempowerment. ✓ Isolation from the community and the family. ✓ Fear of exposure. ✓ Fear of retaliation for reporting organizations that are providing assistance. ✓ Fear of being excluded from assistance. ✓ Victims can be reluctant to receive support services for fear of being stigmatized and losing assistance, especially if the alleged perpetrator is employed by the organization providing the service.
Applying a survivor-centred approach to reporting SEA and supporting victims[3]	
For the purpose of providing victim assistance, all individuals who report are assumed to be victims, in order to best meet their needs and also to secure the best possibility of gathering evidence in due course.	
✓ Providing safe, quality assistance is part of the accountability of the UN system's response to SEA. ✓ Every child and adult complainant and victim of SEA has the right to receive services irrespective of whether they cooperate with the investigation or other procedures, regardless of decisions to proceed with an investigation, and regardless of the outcome of the investigation. ✓ Victims are not required to identify the perpetrator or prove that they are victims of SEA to access services. ✓ Assistance should be provided by competent service providers in line with a 'do no harm' and victim-centred approach, and respecting informed consent. ✓ Victims should be able to access services, including immediate assistance, such as urgent medical care, safety and protection, shelter, basic material assistance (food, clothing, transportation), psychosocial support, legal services, and support to children. ✓ If available, GBV case management services should be provided, and a case manager or social worker should accompany them throughout the process of service provision. ✓ A victim has the right to make their own decision, including to refuse assistance at any time, even after they began receiving it. They have the right to access support at a later stage if they wish.	

1 UNHCR GBV Policy

2 IASC Victim-Centred Approach to SEA

3 Technical Note on the Implementation of the UN Protocol on the Provision of Assistance to Victims of SEA

Regional Refugee Response for the Ukraine Situation

UNHCR The UN Refugee Agency

Practical tips to help you implement a survivor-centred approach with SEA victims

- ✓ Know who is your organization's PSEA Focal Point. Do not delay reporting an incident of SEA.
- ✓ Do not try to obtain information about the incident or to conduct an investigation. Doing so can put both you and the victim at risk.
- ✓ Do not share information on the incident, the alleged perpetrator, or the victim with anyone else.
- ✓ Explain to the victim the availability of services and offer support to access them, either in another location or via another service provider, depending on the severity and the risks.
- ✓ When receiving an **SEA allegation that does not come from the victim**:
  - ☐ Refer the information to your PSEA focal point, while respecting the confidentiality of the information and of the person making a report.
  - ☐ Do NOT seek out the victim to provide assistance as this may create risk of harm to them.
  - ☐ Provide information about resources that may be available based on referral pathways.
  - ☐ Encourage the person who shared the allegation with you to share this information confidentially with the victim.
- ✓ When receiving an **SEA disclosure directly from the victim**:
  - ☐ Treat the victim with dignity and respect. It is your duty to inform them properly about the assistance they are entitled to.
  - ☐ Provide the victim with truthful and realistic information.
  - ☐ Do not share information about things you are not sure or aware of. This can cause harm.
  - ☐ Remember the following steps and **LOOK, LISTEN** and **LINK**.
    1. Introduce yourself (name, role, organization) and assess if the surroundings are safe and confidential, and if there are immediate physical and health risks to the victim.
    2. If there is immediate danger of serious harm, and needs of immediate protective action, urgently refer the case to a GBV actor or Child Protection actor (if the victim is a child).
    3. If you are not a GBV case manager, it is not your role to provide case management to the victim, including to develop a safety or protection plan.
    4. Inform the victim about their rights and your obligation on mandatory reporting of GBV and explain limitations to confidentiality so they evaluate their options and possible outcomes.
    5. If you are not sure about what to do when you encounter a situation of mandatory reporting, contact the GBV and Child Protection Sub-Sectors' leads. See contacts below.
    6. If the victim is a child, always contact a Child Protection actor.
    7. Listen and validate victims' experiences, allowing them to share as much, or as little, information. Do not force them to give information and do not ask probing questions.
    8. Do not try to convince victims to seek support if they do not want to.
    9. Inform the victim about services available and refer them, if they request.
    10. Review the information provided by the victim about the incident, and ask them how and if they would like to be contacted for follow up.

Your role (if you are not the PSEA Focal Point or a GBV service provider) ends here.

MODULE 7: CAPACITY-BUILDING AND VOLUNTEER MANAGEMENT

Refugee-led organizations thrive when they invest in strengthening the skills, knowledge, and competencies of their members. Whether staff or volunteers, the people who drive your mission forward are your greatest asset, and building their capacity directly enhances your organization by improving the efficiency of your programmes and increasing your impact. Building your team's skills, however, means more than just improving how work gets done: it is a strategic investment in the future of your organization that equips your members with the tools to adapt, innovate, and take ownership of their roles.

Strong capacity-building practices can help your organization remain resilient, proactive, and prepared to navigate challenges, strengthening your ability to advocate for and support your community.

Moreover, taking a structured approach to capacity-building ensures that knowledge is not only developed but also retained and shared across your organization, fostering a culture of continuous learning that can benefit both your team and the community you serve.

At the same time, for many RLOs - particularly smaller ones with limited time and resources - the urgency of day-to-day operations can make capacity-building feel difficult to prioritize amid pressing immediate needs, and, as a result, training efforts often risk being postponed or approached inconsistently.

Additionally, capacity-building efforts must take into account the emotional and psychological demands often faced by staff and volunteers working with refugee and forcibly displaced communities. Exposure to distressing stories, crisis situations, and ongoing community needs can place individuals at increased risk of stress, burnout, and vicarious trauma—particularly in organizations where team members may themselves have lived experience of displacement.

Without intentional attention to mental health and well-being, these pressures can affect motivation, retention, and the overall functioning of the organization. Recognizing this reality, this module emphasizes the importance of integrating staff and volunteer well-being into capacity-building approaches, alongside skills development and technical training.

Recognizing how difficult is to balance these constraints with the need to approach training in a structured way, this module provides \ practical tools, materials and strategies that can help you integrate capacity-building into your work effectively and resource-efficiently.

In particular, this module:

- Offers a structured approach to capacity-building, guiding your organization in developing a training strategy tailored to your needs and priorities (Section 1).
- Explores workshops as a practical and flexible training method and provides tools and resources to help you design and deliver effective sessions (Section 2)
- Highlights key external resources and online learning platforms, like the UNHCR Learning Portal, for capacity development (Section 3).
- Outlines best practices for training and managing volunteers, from recruitment to retention, and motivation strategies (Section 4).
- Includes practical tips to support staff and volunteer well-being and reduce burnout risk (cross-cutting).

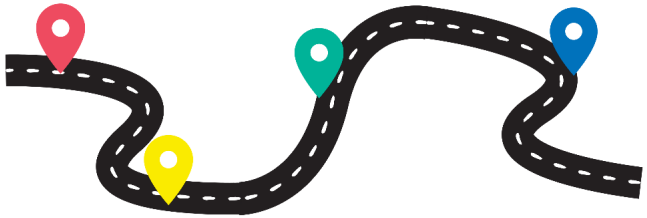
1. DEVELOPING A TRAINING STRATEGY

A well-structured training strategy enables your organization to systematically identify skill gaps, prioritize learning needs, and plan training activities that align with your operational goals. Effective training does not always require a large budget but should be designed to maximize learning outcomes with available resources.

When prioritizing training needs, it is also important to consider staff and volunteer well-being, including stress, workload, and the risk of burnout—especially in roles involving regular exposure to distress.

TOOL: TRAINING ROADMAP

To develop a clear and structured approach to capacity-building, it can be helpful to create a roadmap that provides guidance on key steps to follow, helping your organization make informed decisions and implement training initiatives in a way that is both strategic and sustainable.



1

IDENTIFY LEARNING NEEDS

Conduct a training needs assessment that help you determine the knowledge gaps within your team and identify the most relevant areas for capacity development.

2

PLAN AND DEVELOP TRAINING ACTIVITIES

Based on the results of the needs assessment, start to develop training activities. For each training activity define objectives, target audience, methodologies, and timelines.

3

TRACK TRAINING ACTIVITIES

Maintain a structured record of all training sessions, including attendance and key takeaways. Regularly monitor progress to ensure training activities align with organizational goals.

4

EVALUATE TRAINING AND GATHER FEEDBACK

Assess the impact of the training by collecting feedback from participants. Use surveys, discussions, and post-training assessments to measure knowledge retention and practical application and analyze the results to refine future training initiatives and address any gaps.

TOOL: TRAINING NEEDS ASSESSMENT TEMPLATE

The Training Needs Assessment Template is designed to help you identify skill gaps and prioritize training needs in your organization.

Target	Skill Area	Current Level	Desired Level	Priority	Notes

Instructions to fill out the template:

1. **Target:** Specify the target audience considered.
   E.g.: *Volunteers – Staff – Management*
2. **Skill Area**: Identify the specific competency or skill required for your organization's effectiveness.
   E.g.: *Project Management – Fundraising - Advocacy - Public Speaking*
3. **Current Level**: Assess the existing skill level of the member of your organization in that area
   E.g.: *None, Basic, Intermediate, Advanced*
4. **Desired Level**: Define the target skill level needed for your organization's success
   E.g.: *Basic, Intermediate, Advanced*
5. **Priority**: Rank the urgency and importance of the training based on current gaps and organizational needs.
   E.g.: *High, Medium, Low*
6. **Notes**: Add any additional information, such as potential trainers, available resources, or logistical considerations.

TOOL: TRAINING PLANNER

This tool provides a structured framework for your organization to define, organize, and implement training initiatives strategically and resource-efficiently. Use this template for each training activity.

1. TRAINING OBJECTIVES

- What are the key skills or knowledge areas this training aims to develop?

  _____

- What specific outcomes should participants achieve by the end of the session?

  _____

2. TARGET AUDIENCE

- Who is the training intended for? (e.g., staff, volunteers, management)

  _____

- What is their current level of knowledge on the topic?

  _____

- Are there any language, accessibility, or scheduling considerations?

  _____

3. TRAINING FORMAT & METHODOLOGY

- What is the most suitable training method?

  ☐ In Person Course

  ☐ Online Course

  ☐ Workshop

  ☐ Peer learning session

  ☐ Other: _____

- Who will facilitate the training? (Internal staff, external expert, online platform, etc.)

  _____

- Will the training include practical exercises, case studies, or group discussions?

  _____

4. TRAINING TIMELINE & DURATION

- Date(s) of the training:

  _____

- Duration (e.g., 2 hours, full-day workshop, multi-session course):

  _____

5. TRAINING RESOURCES & LOGISTICS

- What materials or tools are needed? (e.g., slides, toolkits, videos)

  _____

- Training location/platform (physical venue, Zoom, e-learning portal, etc.)

  _____

- Are any technical resources required? (e.g., projector, stable internet, interpretation services)

  _____

- Any well-being considerations? (e.g., session length, breaks, sensitive content, debrief space, referral/support options)

  _____

6. FOLLOW-UP & KNOWLEDGE RETENTION

- Will there be post-training materials or assignments?

  _____

- What follow-up activities can help reinforce learning?

  ☐ Group discussions

  ☐ Additional reading materials

  ☐ Practical application exercises

  ☐ Mentorship or coaching

  ☐ Other: _____

- How will participants apply what they learned in their work?

  _____

7. TRAINING EVALUATION & FEEDBACK

- How will training success be measured? (e.g., informal discussions, feedback surveys, pre/post-tests, follow-up assessments)

  _____

- Will there be any adjustments or follow-up training based on feedback?

  _____

TOOL: TRAINING EVALUATION FACTSHEET

Effective training doesn't end when the session is over. It is essential to assess its impact, gather feedback, and identify areas for improvement. This factsheet outlines key approaches your organization can use to evaluate training efforts.

📌 WHY EVALUATE TRAINING?

- Ensures the training meets participants' needs and expectations.
- Identifies strengths and areas for improvement in content, delivery, and format.
- Helps measure knowledge gained and skills developed.
- Provides insights for designing future training programs.

📊 METHODS FOR EVALUATING TRAINING EFFECTIVENESS

1. Immediate Feedback (Right After Training)

- Collect participant reactions through post-training discussions or quick verbal check-ins.
- Use anonymous feedback forms or digital surveys to gather honest opinions.
- Sample question: *What was the most useful part of the training? What could be improved?*

2. Knowledge Assessment (Before & After Training)

- Conduct pre- and post-training quizzes to measure knowledge improvement.
- Ask participants to apply new skills in small exercises to assess practical learning.
- Sample question: *How confident do you feel applying what you learned in your role?*

3. Practical Application (Follow-Up Assessment)

- Check in with participants after a few weeks to see if they have applied what they learned.
- Gather feedback from supervisors or colleagues on whether the training had an impact.
- Sample question: *Have you used any of the skills or knowledge from the training in your daily work?*

🔄 HOW TO USE TRAINING EVALUATION FINDINGS

- Share feedback with trainers and facilitators to refine future sessions.
- Adapt training content and delivery methods based on participants' suggestions.
- Identify ongoing learning needs and develop follow-up training if necessary.

2. ORGANIZING EFFECTIVE WORKSHOPS

Training can take many different forms, from in-person or online courses to peer learning sessions and informal exchanges. Among these, workshops are one of the most commonly used methods, and often one of the most suitable for RLOs thanks to their flexible and participatory nature.

Workshops are a great way to share knowledge, build skills, and create space for discussion and collaboration. They can be especially useful when working with volunteers or community members who may have limited time and energy, as workshops are more interactive and engaging than traditional lectures. By involving participants actively, through group exercises, discussions, or hands-on activities, workshops make learning more practical and motivating and help keep participants focused throughout the session.

That said, organizing a workshop also takes time, preparation, and significant resources. This means that to make the most of your efforts, it's important to plan well and use your resources efficiently.

In the next sections, you'll find resources and materials to help you do that: from platforms for creating presentations to visual aids for brainstorming and group activities. These can support you in delivering workshops that are clear, impactful, and tailored to your audience.

RESOURCES: APPLICATIONS, MATERIALS AND TOOLS FOR WORKSHOPS

GOOD PRACTICE FROM THE FIELD

From UNHCR Portugal

Planning and running a workshop is much easier when you have the right tools at hand. Below, you'll find a selection of applications, platforms, resources and tools that can support different parts of the workshop process. Part of the materials listed here were originally collected by UNHCR Portugal to support the facilitation of training sessions with refugees and RLOs, and have been adapted and expanded for this toolkit.

TOOLS TO HELP YOU DESIGN AND STRUCTURE A WORKSHOP

To get the most out of a workshop, having good content isn't enough: it also needs to be well-structured, engaging, and delivered in a way that makes the best use of everyone's time. The tools below can help you structure your session, build an agenda, and choose the right activities, whether you're working alone or as a team.

- **SessionLab**: SessionLab is a dedicated tool for designing workshops and training sessions. It lets you build a detailed agenda using a drag-and-drop interface and access a large library of facilitation methods and ready-made activities.
- **Butter**: Butter is an all-in-one platform for running engaging virtual workshops, with features like agenda planning, integrated tools, and reusable templates. Great for keeping everything in one place during online sessions.

TOOLS FOR CREATING PRESENTATIONS

Presentations can be a helpful tool during workshops to guide the flow, highlight key messages, and keep participants engaged. Consider using these tools:

- **Microsoft PowerPoint (+ Copilot, OneDrive and SharePoint)**: As you probably know, PowerPoint is one of the most popular tools for creating presentations. However, an interesting new feature that is not yet widely used is Copilot, Microsoft's AI assistant, which can support you in building your slides. Copilot can generate content, suggest layouts, summarize text, and even help you create a full presentation from a short outline. You can also collaborate with others in real time by saving your presentation on dedicated Microsoft 365 applications like OneDrive or SharePoint, which allow you to share the file with your team.
- **Google Slides**: If your organization primarily uses Google tools like Gmail or Google Drive, you might consider using Google Slides to create your presentations. It allows you to collaborate in real time, with multiple people editing the same file at once. All changes are saved automatically, and the tool is free to use with a Google account. It also includes templates and simple design features to help you create clear and engaging slides.
- **Canva**: If you're looking for a simple and visually appealing way to create presentations, Canva is a great option. Canva offers a wide range of templates, icons, and images you can use to make your slides look polished and engaging. It also allows real-time collaboration, so multiple people can work on the same presentation together. A free version is available, and you only need to create an account to get started. Remember that nonprofit organizations can apply for free access to Canva's premium features.

TOOLS TO FIND ICONS, ILLUSTRATIONS AND PHOTOS

Icons, illustrations and photos are a simple but powerful way to make your presentations more accessible, visually engaging, and easier to follow. Consider using these platforms to find free material that you can use:

- **Canva**: Whether you're using Canva to create your entire presentation or not, you can still browse its large collection of icons and illustrations to enrich your slides or workshop materials. Many of them are free to use, and they can be easily customized in terms of color and size.
- **Flaticon**: Flaticon is one of the largest libraries of free icons in multiple styles and formats. You can customize colors and download icons in PNG, SVG, and other formats.
- **Iconfinder**: Iconfinder offers an extensive collection icons, illustrations, and 3D images in various styles and formats, including SVG and PNG. The platform provides both free and premium content,
- **unDraw**: unDraw presents a collection of modern, customizable illustrations in a consistent style, perfect for giving your materials a unified visual look.
- **The Noun Project**: The Noun Project offers a vast collection of icons, symbols and photos from creators around the world, ideal for inclusive and diverse visual representation.
- **Pexels**: Pexels is a platform offering high-quality, royalty-free photos and videos — ideal for making presentations more vivid and professional.
- **Pixabay**: Pixabay offers another large collection of free images, including photos, illustrations, and even vector graphics. No attribution required for most content.

TOOLS TO MAKE YOUR WORKSHOP MORE INTERACTIVE

Interactive tools can turn a passive audience into active participants — helping you collect input, spark discussion, check understanding, and keep energy levels up. Below are some platforms you can use to make your workshops more engaging and inclusive.

- **Mentimeter:** Mentimeter is popular tool for live polls, quizzes, word clouds, and open questions. Participants respond using their phones, making it ideal for both in-person and online workshops.
- **Pigeonhole Live**: Pigeonhole Live is a great tool for running Q&A sessions, polls, and surveys during workshops. It's particularly useful for large groups and events where anonymity or multilingual input is needed.
- **Miro**: Miro offers a collaborative online whiteboard that's perfect for remote and hybrid workshops. It includes hundreds of templates and is ideal for brainstorming, mapping ideas, and running interactive activities.
- **Slido**: Slido is designed for interactive Q&As, polls, and audience feedback. It integrates well with platforms like Zoom, Webex, and Google Slides.

RESOURCES: FEEDBACK SURVEYS

Collecting feedback at the end of a training session, whether it's a workshop, an online course, or a peer learning activity, is essential to understand what worked well, what could be improved, and how participants experienced the session. It also shows that you value their input and are committed to learning and improving together.

You can ask participants a few simple questions, such as:

- *What is the overall impression of the workshop?*
- *How would you rate the relevance of the workshop to your activities?*
- *How would you rate the organization of the workshop?*
- *What did you find most useful?*
- *How clear was the information and the materials provided in the workshop?*
- *Did you feel comfortable participating?*
- *What would you change or improve?*
- *Do you have any additional comments or recommendations?*

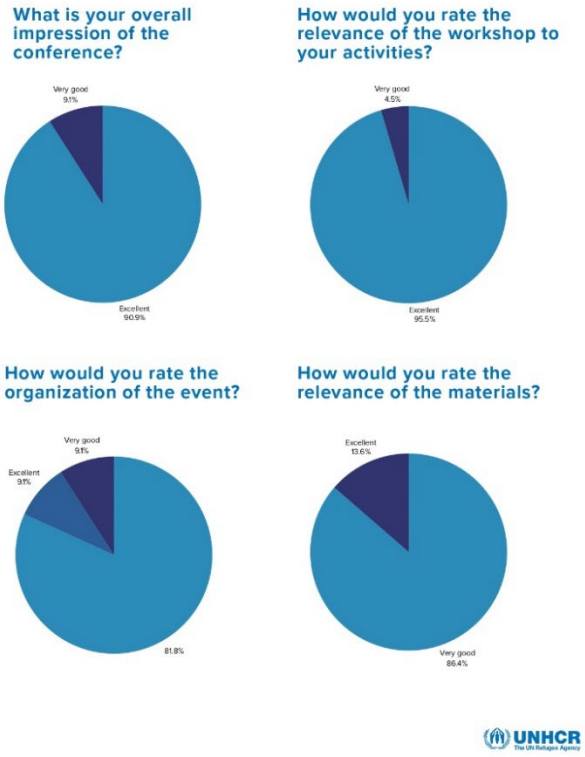
It's important not only to collect feedback, but also to share the results with participants. This opens the door to further dialogue and gives space for shared reflection and ongoing collaboration.

Below, you'll find an example of a feedback survey used by UNHCR Czechia at the end of a workshop for Ukrainian RLOs held in October 2024. The workshop focused on bringing the expertise of local actors together to jointly identify challenges faced by Ukrainian refugees and propose concrete solutions.

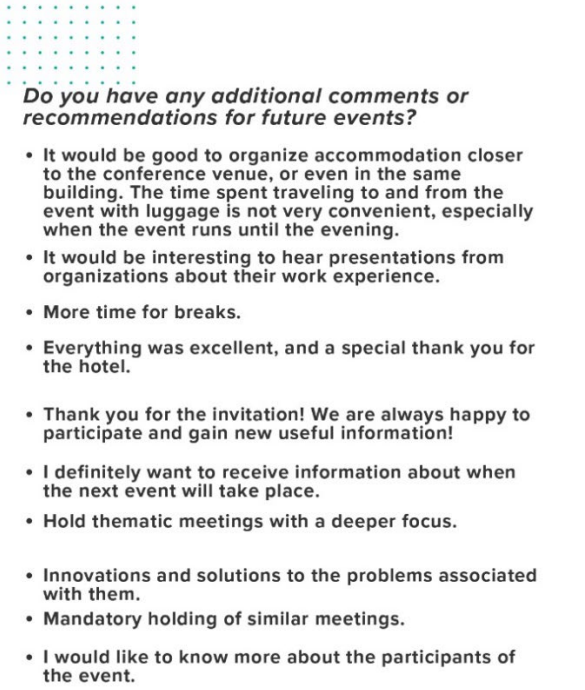
GOOD PRACTICE FROM THE FIELD

From UNHCR Czechia

The results of the survey used by UNHCR were later shared with the participants and used to shape the next steps. You can use it as inspiration for your own training sessions.



For some questions, you can ask participants to rate their experience using a scale: for example, from "Excellent" to "Poor" or by assigning a score from 1 to 5. These results can then be presented visually through simple charts, such as pie diagrams or bar graphs, to make them easier to understand and discuss.



For other questions, you can leave space for participants to write short answers in their own words. These responses can then be collected, summarized, and shared with the group to highlight common ideas, suggestions, or concerns.

3. LEVERAGING ONLINE LEARNING RESOURCES AND OPPORTUNITIES

While capacity-building is essential for RLOs, organizing resource-intensive activities like in-person workshops or training programmes with external experts often demands financial resources, time, and logistics coordination that many organizations may struggle to secure. However, by being strategic and making the most of available opportunities, RLOs can still develop strong capacity-building programs without large financial commitments.

To this end, it is important to consider that many high-quality online learning resources are accessible for free and can be used to strengthen the skills and knowledge of the members of your organization in a flexible way that fits your needs and constraints. Likewise, it may be helpful to explore whether there are any capacity-building programmes or initiatives available in your country that your organization can join. In some contexts, for instance, UNHCR promotes dedicated programmes that help RLOs grow by providing training to their members and/or access to funding.

In this section, you can find a list of online learning resources that offer accessible or free training in key areas, ranging from protection to leadership, management and communication. Among these, the **UNHCR Learning Portal** is a key platform to find courses and resources focused on refugee protection, refugee law, and humanitarian work.

RESOURCES: UNHCR LEARNING PORTAL

As the UN's lead on protection for forcibly displaced and stateless people, UNHCR continually develops and updates learning resources for all actors engaged in international protection and working with and for refugees, internally displaced and stateless persons. To make this knowledge accessible, UNHCR has created the **UNHCR Learning Portal**, a comprehensive platform offering free resources and training materials for both UNHCR staff and external learners. Resources in the UNHCR Learning Portal cover a broad range of topics, aiming to deepen understanding of UNHCR's mandate and work - from protection and programming to long-term solutions - while also providing essential insights into refugee law and humanitarian principles.

From the portal, learners are directed to two main knowledge hubs, Workday and Refworld.

WORKDAY E-LEARNING COURSES

One of the primary components of the Learning Portal is its connection to **Workday**. Through Workday, users can access a diverse catalog of self-guided and multilingual **e-learning courses** tailored to help users strengthen their skills and knowledge in alignment with global protection standards. Courses cover topics such as: refugee protection, gender-based violence, law and policy, child protection, third-country solutions and many others.

REFWORLD

The second key component linked through the UNHCR Learning Portal is **Refworld**, the **Global Law and Policy Database** on refugee law and statelessness operated by UNHCR, available in English, Spanish and Russian. Refworld provides free and easy access to comprehensive and high-quality content from UNHCR and other authoritative external sources. By ensuring access to reliable, up-to-date information, Refworld equips learners with the legal and contextual knowledge necessary to advocate for refugee rights and understand complex protection challenges.

Refworld repository includes the following document collections:

- Legal Instruments
- Case Law
- Policy & Guidance
- Research & Reports
- Country of Origin Information (COI)[13]

[13] Only available in Russian & Spanish Refworld. For COI in English, please visit ecoi.net.

RESOURCES: LEARNING MATERIALS AND OPPORTUNITIES FROM UNHCR IN YOUR COUNTRY

Beyond the resources available on UNHCR's Learning Portal, it's good to keep in mind that many UNHCR offices across Europe develop additional learning materials, offering information and guidance that is directly relevant to your local context. In some countries, UNHCR also runs dedicated capacity-building programmes for RLOs and their staff, designed to help organizations grow by providing training and/or access funding. That's why it's always worth checking whether the UNHCR office based in your country offers any learning materials or opportunities that might be relevant to you.

Below, you can find a list of examples of **learning materials** developed by different **UNHCR country offices**:

GOOD PRACTICES FROM THE FIELD

From UNHCR Ukraine, UNHCR Austria and UNHCR MCO Italy

- **UNHCR AUSTRIA - THE COMMUNITY ONLINE CAPACITY POOL**

  The "Community Online Capacity Pool" is a knowledge hub, created as part of UNHCR Austria's Community Dialogue and Forum project. This online platform has been developed in collaboration with Refugee-Led Organizations, based on their needs and interests, and includes webinars and additional learning materials on a wide range of topics related to RLOs' work, such as funding, communication, volunteer management and more. The platform is in German, but webinar videos come with subtitles in eleven different languages, including English, Arabic, Farsi, Dari and Somali.

- **UNHCR MCO ITALY - LEARNING PASSPORT**

  "Learning Passport" is a UNICEF initiative designed to tackle the education barriers that crises and displacement create for millions of children and young people, by providing a series of online and offline platforms that ensure continuous access to quality education. The Italian platform of "Learning Passport" includes contributions from UNHCR MCO Italy and provides online learning modules on protection-related topics such as Child Protection, Gender-Based Violence and protection of LGBTIQ+ individuals. The courses are available in Italian, and several of them offer advanced content that can be useful to train RLOs staff on protection issues.

- **UNHCR UKRAINE – ONLINE LECTURES FOR CBOS**

  UNHCR Ukraine supports a wide range of initiatives aimed at strengthening the capacity and sustainability of Community-Based Organizations (CBOs). One example is its collaboration with the partner organization Crimea SOS, which provides training to CBOs through various formats, including webinars. Since 2018, with UNHCR's support, Crimea SOS has developed numerous webinars and online lectures on topics relevant to community needs, offering essential knowledge and insights into trends in internal displacement and the institutional development of civil society organizations. These lectures, available in Ukrainian, can be accessed on the official Crimea SOS YouTube channel.

RESOURCES: ONLINE LEARNING PLATFORMS

The following online platforms offer learning opportunities in different fields:

- **Coursera**: Offers courses provided by prestigious universities from around the world in a wide range of fields. While many courses are free to access, some require payment to obtain a certificate upon completion. In collaboration with UNHCR, Coursera launched the "Coursera for Refugees Programme", providing refugees with free access to its courses. The availability of the Coursera for Refugees program varies by country. For instance, it is available in Italy, Czechia, and Bosnia and Herzegovina and Spain. Refugees can also freely access some courses on Coursera by registering to the Kiron platform.
- **Kiron**: Offers free learning opportunities for refugees and asylum seekers. Learning opportunities are self-paced, accessible at any time, and include online courses, learning programs and webinars.
- **AGORA**: UNICEF's global learning hub, providing free educational opportunities to UNICEF staff, partners, and supporters. It offers a wide range of courses on the humanitarian and development landscape, the UN Human Rights framework, and key global initiatives aligned with UNICEF's mission. Additionally, AGORA features resources designed to enhance leadership, management, communication, and other personal skills.
- **UNICEF Global Learning Passport**: An online learning platform created by UNICEF to support children and young people, especially in displacement or emergency settings. It provides access to formal and non-formal education, including national curricula, life skills, and digital literacy content, and can be used offline. While primarily designed for learners, the platform also includes more advanced courses that can be useful for professionals and community-related work. In addition to the Global Learning Passport platform, several countries have developed national versions that include context-specific materials, often aligned with local curricula or community needs, that you can explore here.
- **Kaya Connect**: Created by the Humanitarian Leadership Academy, offers courses in several languages on humanitarian response, project management, and other technical topics.
- **DisasterReady.org**: Developed by the Cornerstone OnDemand Foundation, offers free courses to better prepare humanitarian and development professionals, and is available in English, Arabic, French, Spanish and other languages.

4. MANAGEMENT AND TRAINING OF VOLUNTEERS

In many RLOs, volunteers play a central role, contributing with their time, skills, and energy to support the activities of the organization. Especially for smaller RLOs with limited resources, volunteers' dedication is often what keeps the organizations running, filling critical gaps in service delivery and community support. However, training volunteers effectively requires a different approach than training staff.

This is the case, first, because volunteers often come from **diverse professional backgrounds** and have **varying levels of experience**. Unlike staff members, who usually have clearly defined roles and structured responsibilities, volunteers bring different skill sets, levels of familiarity with humanitarian work, and personal motivations for getting involved. This diversity means that training cannot be one-size-fits-all, but it should rather be flexible and adaptable to meet the range of knowledge and experience levels within a volunteer team.

Second, volunteers often have **limited commitment in terms of time and availability**. Many engage in short-term or irregular activities, making it essential for training to be both efficient and impactful. Overwhelming them with too much information can lead to disengagement, while too little preparation may leave them feeling ill-equipped for their roles. A well-designed training program should strike a balance: providing essential knowledge while ensuring volunteers feel valued, motivated, and confident in their contributions.

Finally, volunteers frequently serve as **one of the main points of contact between RLOs and refugee communities**, acting as a bridge to essential services and support. This frontline role means that their interactions have a direct impact on the trust, dignity, and well-being of those RLOs assist. Without proper training, even well-intentioned volunteers may inadvertently cause harm or reinforce power imbalances. Therefore, training must go beyond logistics and procedures and must instil humanitarian principles, ethical conduct, and communication strategies that promote respect, empowerment, and inclusivity.

Supporting Staff and Volunteer Well-Being

Capacity-building is most effective when it supports not only skills development, but also the people delivering the work. In many RLOs, staff and volunteers may face high workloads, emotional demands, or pressure to respond to urgent community needs. While resources may be limited, small and intentional practices can help promote well-being and sustain engagement over time:

- Keep roles, responsibilities, and expectations clear to reduce stress and prevent overload.
- Encourage realistic time commitments and respect staff and volunteers' availability and limits.
- Build in brief check-ins or debriefs after demanding activities or events.
- Promote peer support and teamwork, rather than working in isolation.
- Normalize taking breaks, stepping back when needed, and asking for support.

TOOL: VOLUNTEER TRAINING & MANAGEMENT CHECKLIST

This tool provides a structured yet flexible approach to volunteer training and management, helping your organization effectively integrate, support, and retain volunteers.

1. ONBOARDING

☐ Provide a clear **introduction** to the organization's mission, values, and key programs.
☐ Explain the **role of volunteers** and how their contributions fit into broader activities.
☐ Assign a **point of contact or mentor** for new volunteers to help them settle in.
☐ Provide a simple "**Volunteer Handbook**" (if available) with key policies, expectations, and contact information.

2. TRAINING

☐ Identify the **specific skills needed** for volunteers (e.g., advocacy, logistics, community engagement).
☐ Ensure volunteers understand the **ethical and protection principles** relevant to their work, particularly in sensitive areas such as Protection from Sexual Exploitation and Abuse (PSEA).
☐ Offer clear examples of "**Dos and Don'ts**" to guide volunteers who directly engage with refugees and communities.
☐ Offer **training**, either through workshops, peer learning, or shadowing experienced members.
☐ Encourage **peer learning**, where experienced volunteers mentor newcomers.

3. MOTIVATION & RETENTION STRATEGIES

☐ Schedule **regular check-ins** to provide feedback, answer questions, and ensure volunteers feel supported and where volunteers can share their experiences and suggest improvements.
☐ Recognize and **appreciate volunteers' contributions** (e.g., certificates, appreciation events, thank-you messages).

☐ Foster a **sense of community** by organizing informal gatherings or team-building activities.
☐ **Promote wellbeing** in volunteer teams (e.g., realistic workloads, breaks, buddy systems, and brief check-ins after difficult activities).
☐ Provide opportunities for volunteers to **take on more responsibility or grow** within the organization.
☐ Adapt training to **volunteers' availability and be flexible** - acknowledge that volunteers have other commitments and accommodate their availability where possible, and consider that short, practical sessions work better than long, complex ones.

4. EXIT & CONTINUED ENGAGEMENT

☐ Conduct a **brief exit discussion** with volunteers who leave to understand their experience and gather insights for future improvements.
☐ Encourage departing volunteers to **stay connected with the organization** (e.g., as advocates, donors, or occasional supporters).

TOOL: VOLUNTEER DOS AND DON'TS GUIDE

GOOD PRACTICE

From UNHCR Regional Bureau for Europe

This Volunteer Dos and Don'ts Guide, developed by UNHCR Regional Bureau for Europe in 2022, provides a simple framework to help volunteers navigate their interactions with refugees in a way that upholds dignity, fosters trust, and aligns with humanitarian principles. By following these guidelines, volunteers can contribute to a safe and positive environment where refugees feel heard, respected, and supported in their journey toward rebuilding their lives.

UNHCR
The UN Refugee Agency

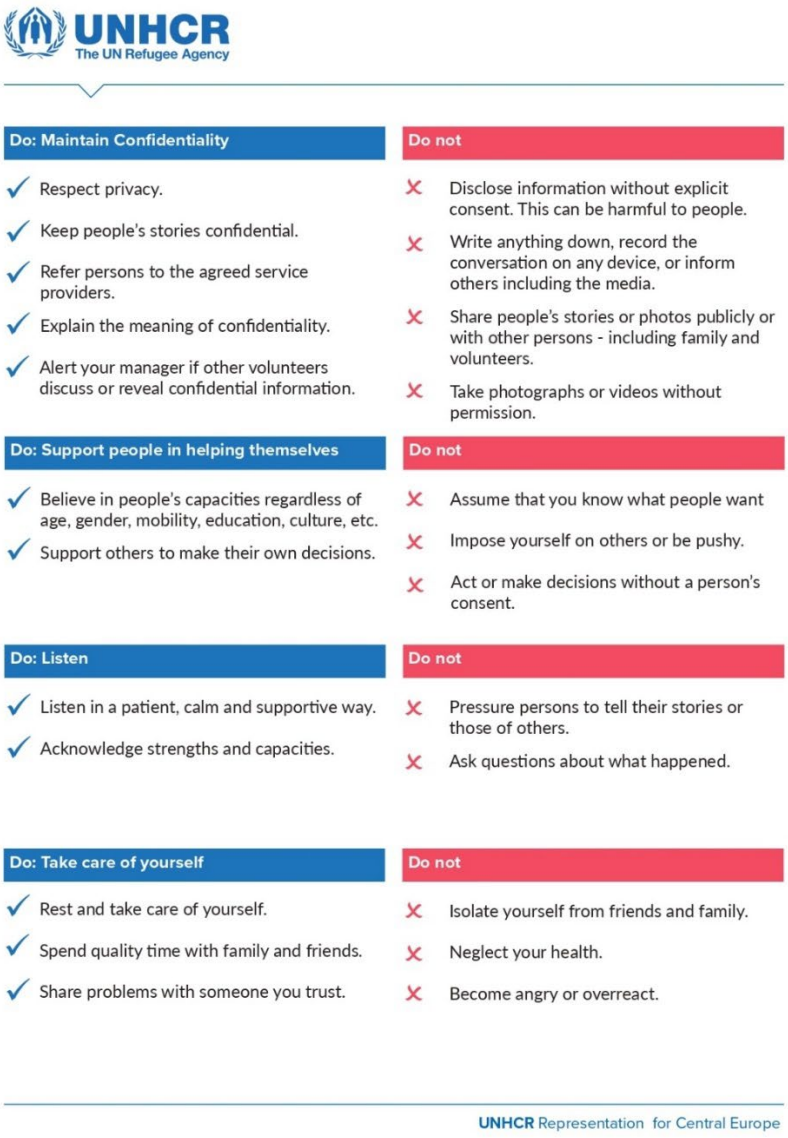
Do's and Don'ts to support Refugees in a responsible and ethical manner

Do: Treat people with dignity and respect	Do not
✓ Introduce yourself and your role as a volunteer.	✗ Start doing things or talking to persons without them knowing who you are.
✓ Accept what is said without passing judgment.	✗ Contradict or judge what someone tells you.
✓ Treat all people equally and with respect.	✗ Approach children without permission from parents.
✓ Remember people have different ideas about appropriate conduct. Check if you think your behavior may cause offense.	✗ Make comments that suggest a survivor of violence, exploitation or abuse may be at fault.
✓ Reach out to the designated organization if you think somebody's life or safety is at risk.	✗ Request or accept anything in return for assistance, including payment or favors of any kind.
✓ Remember all assistance is free. It is prohibited to ask for or receive any payment, service or sexual favors in exchange.	✗ Engage in sexual activities with those in need of help.

Do: Be prepared and stay informed	Do not
✓ Maintain and provide up-to-date information.	✗ Provide information you are unsure of or have no knowledge about.
✓ Request information on the standards of conduct and behaviour expected of you.	✗ Make things up or give false information or promises.
✓ Tell individuals you will get back to them later if you do not have the information they seek.	✗ Start work without knowing what is expected of you.

Do: Listen and respond to feedback	Do not
✓ Take note of comments, or recommendations from the people you interact with.	✗ Feel personally attacked by negative comments
✓ Refer comments to your supervisor to take action.	✗ Be afraid to refer the comments to your supervisor.

UNHCR Representation for Central Europe



For more information, please contact Vincent Briard, Senior Gender-Based Violence Officer, CBP Unit, RBE, briard@unhcr.org

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Produced in December 2025 by the UNHCR Regional Bureau for Europe
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