

Terms of Reference

Design and delivery of training modules for effective reputational risk management, crisis communications, and lessons learnt methodology

United Nations High Commissioner for Refugees



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1. Introduction

1.1. Contextualizing UNHCR

The U.N. General Assembly established the Office of the United Nations High Commissioner for Refugees (UNHCR) in 1950 to provide protection and assistance to refugees. Today, UNHCR is one of the world's principal humanitarian agencies. UNHCR operates in 137 countries worldwide and has a workforce of close to 20,000 people responding to the needs of over 110 million displaced people across the world. For more information, please visit <http://www.unhcr.org>.

To deliver in the places where we are needed most, UNHCR works in complex environments under the threats of armed conflict, terrorism, political instability, poverty, and corruption that can generate high risk for affected populations and the organization. From climate change to pandemics, we rise to new challenges which amplify the already significant risks posed by displacement. To effectively manage the uncertainties we face, UNHCR is increasingly focused on strengthening its risk management capacity and anticipatory action, as well as learning from past experiences. As we respond to the needs of an ever-larger number of displaced people worldwide - and the public scrutiny that comes with such a response - expectations placed on us by those forced to flee, host communities, Member States, partners, colleagues, and the wider public have never been higher.

UNHCR's reputation is one of its strongest assets: it is one of the reasons why UNHCR can operate all around the world and receive the political and financial support that we need to assist and protect refugees. The context for crises, including on the political, security and humanitarian fronts, is increasingly complex: we are scrutinized, particularly over integrity issues. Reports of incidents of sexual exploitation and abuse and sexual harassment perpetrated by humanitarian workers, as well as allegations of fraud and corruption, have shaken donor and public trust and led to an increased level of scrutiny.

In a rapidly evolving communications environment, accelerated by real-time social media, it can prove challenging for UNHCR to give context to its work and make its voice heard in risk-prone environments. However, if the organization can better anticipate the challenges and opportunities it may face in real time, many actions can be taken to prepare at local, regional, and global levels. These preparedness measures help save time at critical decision-making moments and better equip colleagues across the world to respond to emerging situations and contain crises. Having the skills to plan for different scenarios that could emerge and learn lessons from both successes and failures, will better enable the organization to adapt, build resilience, and use its resources more effectively.

The organization has embarked on a journey to strengthen risk preparedness and mitigation, with clear structures, tools, and processes in place to better identify and mitigate reputational risks and lead effective and timely responses in case of escalation. Those working for UNHCR, especially in leadership, communications, and risk management roles, must be able to navigate the spectrum of understanding and mitigating reputational risks to avoid communications crises, effectively handle communications crises, continuously analyze the risk picture, plan against future crises, and learn lessons along the way. To that end, it is crucial for the organization to ensure that relevant colleagues have the necessary knowledge and tools to:

1. Better identify and manage reputational risks
2. Avoid communications pitfalls that can severely damage UNHCR's public image
3. Deal with communications crises in a timely and effective manner
4. Learn lessons from successes and failures to help identify and address remaining gaps

1.2. Reputational risk management and crisis communications training in UNHCR to date

Since 2020, UNHCR's Enterprise Risk Management (ERM) Service and the crisis communications team in the Global Communications Service (GCS), with the support of an external supplier, have trained a wide range of colleagues to identify and mitigate reputational risks, to respond to communications crises, and to apply these substantive skills through a high-pressure simulation exercise. More than 400 UNHCR personnel – primarily country representatives, senior managers in regional bureaus and headquarters, communications/external relations officers, and members of the UNHCR risk network - have participated in a series of three-day (12 hours total) virtual reputational risk management and crisis communications workshops that included a scenario-based crisis simulation.

In addition, an e-learning course on reputational risk management and crisis communications, based on a fictional scenario, was developed and made available to all UNHCR personnel. Based on the content of that e-learning and the virtual workshops offered from 2020-2023, a facilitation guide and materials to execute a standard simulation exercise was developed for country operations or regional bureaus to train their teams and identify gaps in reputational risk management and crisis communications.

With the first stage of training now completed, there is a need to adjust and diversify the training offer to best meet the evolving needs of our workforce. UNHCR seeks the services of a vendor to develop additional tailored deliverables that offer a deep dive on the following interrelated topics:

- Reputational risk management and crisis communications response capacities
- Lessons learnt when a reputational risk or crisis has materialized

2. Service requirements

UNHCR is seeking support for:

1. The design and co-facilitation of virtual workshops on reputational risk management and crisis communications, including a crisis simulation exercise (**Lot 1.A**)
2. The design and co-facilitation of tailored, virtual, or face-to-face simulation exercises on reputational risk management and crisis communications for specific audiences (**Lot 1.B**)
3. The design and co-facilitation of virtual refresher sessions on reputational risk management and crisis communications for senior leaders or risk management / communications colleagues (**Lot 1.C**)
4. The design and co-facilitation of abridged virtual reputational risk management and crisis communications session for individual senior managers (**Lot 1.D**)
5. The design of a methodology to facilitate a lessons learnt workshop after a reputational risk or crisis has materialized; the delivery of workshops to train on how to run such a workshop (i.e. training of trainers); and, as needed, co-facilitation of lessons learnt workshops (**Lot 2**)

Service provides can bid to:

- Lot 1 only (as a package)
- Lot 2 only
- Lot 1 and Lot 2

2.1. Lot 1.A: Design and co-facilitation of virtual workshops on reputational risk management and crisis communications

As described above, UNHCR has been delivering three day (12 hours) virtual workshops on reputational risk management and crisis communications since 2020. The existing training is a modular programme covering topics including identification of reputational risks, scenario planning, stakeholder management, leadership of risk management and crisis communications, risk mitigation and crisis communications tools and best practices. In addition, the third day of the programme comprises a crisis simulation exercise that allows participants to apply the substantive skills learned during the first two days in a fictional but realistic, high-pressure environment.

The existing materials, including the scenario, will be shared with the selected vendor.

Workshop design

Considering the existing materials, the selected vendor should develop fresh, engaging, interactive and tailored content. The new, eight-hour virtual training will be delivered over two days, including:

- two hours dedicated to reputational risk management
- two hours dedicated to crisis communications
- four hours dedicated to a communications crisis simulation

For the four-hour simulation, the selected vendor should develop a role-play simulation of an evolving communications crisis, in a humanitarian setting relevant to UNHCR, with potential significant reputational consequences. The simulation should be used to 1. Test the participants' crisis response approach; 2. Practice decision-making in difficult, high-pressure situations; and 3. Help identify and address gaps. Considerations of risks should be incorporated into the exercise throughout the simulation. A key aim is to raise awareness on the importance of identifying and properly handling reputational risks, including those relating to integrity issues, and effective stakeholder management.

The simulation exercise should be identical for all participants, and standard content should be developed for the 2 two-hour blocks on reputational risk management and crisis communications. In addition, the selected vendor should create additional tailored content (no more than 30% of the two hours mentioned above) to meet the needs of two main target groups:

- senior managers and risk management colleagues (group 1)
- communications and external relations colleagues (group 2)

In this way, as needed, there can be extra focus given to crisis communications and social media for group 2, or extra focus given to reputational risk management and leadership for group 1.

The content for UNHCR senior managers and risk management colleagues will aim at:

- Building capacity to manage reputational risks and crisis communications proactively and effectively (including those relating to integrity issues and emerging risks).
- Developing understanding of and capacity to take appropriate reactive measures to reputational risk events and communications crises.
- Utilizing existing risk management and crisis communications tools and sharing good practices.
- Offering guidance on what effective leadership in crisis situations entails.
- Clarifying roles and responsibilities between country operations, regional bureaus, and headquarters in addressing reputational risks and dealing with communications crises.

The content for UNHCR communications/external relations colleagues will aim at:

- Reviewing UNHCR's reputational risks and crisis communications strategy and existing tools.
- Increasing capacity to identify and mitigate reputational risks and learning from good practices.
- Increasing capacity to handle communications crises, including effective handling of media inquiries and effective management of social media in crisis situations.

- Clarifying roles and responsibilities between country operations, regional bureaus, and headquarters when a crisis emerges.

The selected vendor will familiarize themselves with the pre-existing materials and tools and develop a training curriculum outline and resource materials for both groups (UNHCR senior managers and risk management colleagues and UNHCR communications/external relations colleagues). Resource materials could include but are not limited to case studies, videos, audio snippets, simulated social media posts, presentation bank, exercises, multimedia resources and other supporting facilitation materials.

The selected vendor will develop a curriculum and resource material and undertake up to three revisions of the materials, based on UNHCR's and participants' feedback from the pilot, ahead of the delivery of a final products. Pilot session of the trainings (one for each of the two groups) should be delivered. The pilots will be led virtually by the selected vendor and supported by UNHCR, following the preliminary revision of the curriculum and resource materials. The cost for the pilots should be comprised in the financial offer. The first draft of the curriculum and resource materials should be developed within six weeks from the start of the agreement (i.e., when UNHCR decides to launch the work).

In addition, there is an expectation that over the period of the frame agreement, the curriculum and resource materials will be updated, based on, inter alia, new examples that emerge, significant feedback from participants or changing organizational context. There would be an expectation that with such revisions, less than 20% of the source content would change. The fee for the workshop design should take this contingency into account.

All resources should be developed in English and provided to UNHCR in digital format. The selected vendor should compile the source content of the training package (PowerPoints, videos, key messages from the workshop, etc.) into a user-friendly package that can be distributed to participants after the workshop.

Workshop delivery

The workshop content will be delivered virtually to groups of approximately 15 participants, targeting Group 1 (UNHCR senior managers, the UNHCR risk network and other senior stakeholders) and Group 2 (communications and external relations colleagues). There would be an expectation of 2-3 cohorts for both groups of colleagues per year for the duration of the framework agreement.

The workshops will be facilitated by the selected vendor, with support from UNHCR's ERM Service and/or GCS/crisis communications team. UNHCR will act as the subject matter expert and present UNHCR-specific content as needed, as well as support interactions with participants. Based on the size and complexity of the workshop, a team of facilitators may be required, with as-needed scale-up capacity to run the simulation. To the extent possible, there should be continuity of facilitators throughout the duration of the frame agreement. It is expected that the selected vendor will have extensive experience in developing and delivering holistic, realistic, multi-person crisis simulation exercises that build a link between reputational risk management and crisis communications. A strong understanding of the humanitarian mandate of UNHCR and its operating environment is essential.

2.2. Lot 1.B: Design and co-facilitation of tailored simulation exercises on reputational risk management and crisis communications for specific operations, regional bureaus, or HQ entities

UNHCR operates in some highly complex, sensitive countries with distinctive needs when it comes to identifying specific reputational risks and responding to potential communications crises. To prepare personnel in such operations for the challenges and dynamics of a communications crisis, UNHCR will run tailored simulation exercises to help teams respond to the complexities, effectively identify and manage specific reputational risks, implement crisis communications protocols, and facilitate decision-making processes and coordination efforts. Participants would comprise key UNHCR personnel such as senior managers, communications/external relations officers, and risk colleagues in a given country operation.

The exercise would aim to achieve the following goals:

- Help the operation gain a clear understanding of the reputational risk picture facing them and ways to enhance reputational risk management
- Test the strategies/resources available to deploy in the event of a communications crisis
- Understand the information flow and communications channels, including any potential gaps in preparedness or management of risks
- Strengthen collaboration among the involved colleagues, ultimately enhancing UNHCR's ability to communicate and respond during a communications crisis in an effective and timely manner

To achieve these goals, the service provider would design a multi-person role-play scenario based around reputational risks that would be pre-identified in coordination with the operation and that develop into a communications crisis. During the simulation, participants will be exposed to a combination of a role-playing, simulated media and social media interactions and real-time scenario updates to simulate the evolving nature of a communications crisis. They will be asked to navigate through various risk management and communications challenges, leading them to identify reputational risks, manage effectively external stakeholders' expectations, ensuring solid internal information flow and coordination and developing and implementing an effective crisis response. Resource materials could include but are not limited to case studies, videos, audio snippets, simulated social media posts, presentation bank, exercises, multimedia resources and other supporting facilitation materials.

The content of the simulation exercise should be approached in the same way as the four-hour communications crisis simulation detailed in Lot 1A but use a different, specific scenario. No pilot of the scenario would be necessary.

The workshops will be facilitated virtually or, exceptionally, face-to-face by the selected vendor with support from UNHCR's ERM Service and / or GCS/crisis communications team. UNHCR will act as the subject matter expert and present UNHCR-specific content as needed, as well as support interactions with participants. Based on the size and complexity of the workshop, a team of facilitators may be required, with as-needed scale-up capacity to run the simulation. A strong understanding of the humanitarian mandate of UNHCR and its operating environment is essential.

All resources should be developed in English and provided to UNHCR in digital format. The selected vendor should compile the source content of the training package (PowerPoints, videos, key messages from the workshop, etc.) into a user-friendly package that can be distributed to participants after the workshop.

2.3. Lot 1.C: The design and co-facilitation of refresher sessions on reputational risk management and crisis communications

In the latter part of the period covered by the contract, UNHCR will organize virtual refresher sessions for senior managers, risk and / or communications / external relations colleagues working in risk-prone

operations or those dealing with reputational risks in the regional bureaus or headquarters, and who have already benefitted from one of the previous training initiatives.

The refresher sessions should be three hours maximum and review and reinforce the lessons learnt in other reputational risk management and crisis communications workshops (e.g., Lot 1.A or other workshops UNHCR has organized in the past). The sessions should help participants maintain and update their knowledge, address any gaps in understanding, and refresh and practice their reputational risk management and crisis communications skills. The sessions are expected to be highly interactive, with opportunities to practice and engage in group exercises.

The selected vendor will familiarize themselves with the existing materials and tools and develop a training curriculum outline and resource materials for the training. Resource materials could include but are not limited to case studies, videos, audio snippets, simulated social media posts, presentation bank, exercises, multimedia resources and other supporting facilitation materials.

The selected vendor will present a curriculum and resource materials and undertake up to three revisions of the materials, based on UNHCR's feedback, ahead of the delivery of a final product.

All resources should be developed in English and provided to UNHCR in digital format. The selected vendor should compile the source content of the training package (PowerPoints, videos, key messages from the workshop, etc.) into a user-friendly package that can be distributed to participants after the workshop.

Workshop delivery

The workshop content should be delivered virtually to a group of 20-30 participants. There would be an expectation of approximately two workshops per year, within the timeframe of the contract.

The workshops will be facilitated virtually by the selected vendor with support from UNHCR's ERM Service and / or GCS/crisis communications team. UNHCR will act as the subject matter expert and present UNHCR-specific content as needed, as well as support interactions with participants. A strong understanding of the humanitarian mandate of UNHCR and its operating environment is essential.

2.4. Lot 1.D: Design and co-facilitation of short reputational risk management and crisis communications sessions for individual senior managers

To complement its existing training materials, UNHCR will organize, upon request, short, dedicated virtual training sessions on reputational risk management and crisis communications for a limited number of senior managers. The sessions should be two hours maximum and offer highly targeted content on the management of reputational risks and communications crises at senior level linked to the specific challenges they may face.

The selected vendor will familiarize themselves with the existing materials and tools and develop a training curriculum outline and resource materials for the training. Resource materials could include but are not limited to case studies, videos, audio snippets, simulated social media posts, presentation bank, exercises, multimedia resources and other supporting facilitation materials.

The selected vendor will present a curriculum and resource materials and undertake up to three revisions of the materials, based on UNHCR's feedback, ahead of the delivery of a final products. Further revision might be needed, based on feedback received from senior managers following the delivery of individual sessions.

The workshops will be facilitated virtually by the selected vendor with support from UNHCR's ERM Service and / or GCS/crisis communications team. UNHCR will act as the subject matter expert and present UNHCR-specific content as needed, as well as support interactions with participants. Facilitators should be individuals with specific expertise and extensive, documented experience in supporting senior leadership in the management of reputational crises, including in the humanitarian sector.

All resources should be developed in English and provided to UNHCR in digital format. The selected vendor should compile the source content of the training package (PowerPoints, videos, key messages from the workshop, etc.) into a user-friendly package that can be distributed to participants after the workshop.

2.5. Lot 2: Design of a methodology to facilitate lessons learnt workshops and delivery of training-of-trainers workshops

Understanding and implementing lessons learnt is crucial for continuous improvement and effective response, and it is an essential part of effective risk management. Workshops to understand lessons learnt after a reputational risk has materialized can provide UNHCR's leadership with an opportunity to reflect on past experiences, identify strengths and weaknesses, and extract valuable insights. This can help UNHCR be better prepared, optimize resource allocation and ultimately respond better to crises in the future. UNHCR aims to build the knowledge and skills of selected individuals to facilitate lessons learnt workshops, enabling them to guide other participants in analysing past experiences, extracting valuable insights, and promoting continuous learning and improvement following the materialization of a reputational risk event or a crisis.

Workshop content and methodology design

The selected vendor should design written guidance for UNHCR facilitators demonstrating how to lead a four-hour virtual or exceptionally, face-to-face, lessons learnt workshop. The methodology should include learning objectives and step-by-step instructions on the design, organization, and facilitation of a workshop, using participatory methodologies to simulate interaction among groups of 20-30 participants. The guidance will be used by trained UNHCR facilitators to lead workshops, with possible co-facilitation by the selected vendor (see "Additional task" below).

The workshop methodology should include:

- The objectives to be achieved by the workshop
- Topics and specific issues to be discussed in sessions and practiced in exercises
- Draft programme, timing, and outputs of the various sessions
- Description of interactive activities to achieve the workshop objectives (including step-by-step instructions to run activities, materials required and other resources)
- Preparations for the facilitation team and any required advance training/preparation
- Recommended typology and number of participants and other stakeholders (e.g. subject matter experts, UNHCR staff) to be involved and invited
- Recommended use of space and other logistics
- Methodology for post-workshop evaluation and recording of results (e.g. template for a lessons learnt report to be prepared by the facilitators of the workshop)

Using real-life or hyper-realistic examples from UNHCR's work to illustrate concepts, the content of the workshop should be designed for learners to achieve the following:

1. Understand the importance of "lessons learnt" by defining the concept and its significance and highlighting real-life examples where lessons learnt have improved risk mitigation and crisis response

2. Familiarize and discuss the purpose and key components of various debrief techniques for conducting “lessons learnt” workshops, including pre-training surveys, after-action review, fishbone diagramming, SWOT analysis, incident mapping (or a combination of multiple techniques) and any other relevant tools
3. Ensure quality analysis and learning through the demonstration of facilitation techniques, including root cause analysis
4. Guide participants in techniques to help operations develop an implementation plan for incorporating “lessons learnt” outcomes into operational plans and practices
5. Help develop and practice facilitation softer skills, including managing difficult discussions and tensions among participants
6. Provide strategies to help colleagues translating insights gained during the debrief exercise into actionable recommendations, especially emphasizing the importance of documenting and disseminating lessons learnt to relevant stakeholders

The selected vendor will familiarize themselves with the already existing materials and tools used by UNHCR. They will develop a curriculum outline and resource materials in support of the workshops. Resource materials include but are not limited to a presentation bank, facilitator’s guide containing exercises, case studies, and reporting templates. The selected vendor will undertake up to three revisions of the materials, based on UNHCR’s feedback, ahead of the delivery of a final products. A pilot session of the trainings, co-delivered virtually by the selected vendor and UNHCR (see details in “Workshop delivery” below), will be scheduled after the revision of first draft, and the cost for the pilots should be comprised in the financial offer.

All resources should be developed in English and provided to UNHCR in digital format. The selected vendor should compile all course materials (PowerPoints, videos, recorded lessons, booklets, etc., per the discretion of the vendor) into a comprehensive self-study resource that can be distributed after the workshop.

Training of trainers

The selected vendor should develop and subsequently deliver the content for four-hour virtual training-of-trainers workshops on how to prepare for and run lessons learnt workshops. The workshop audience will comprise 20-30 senior leaders, senior risk advisers and senior communications colleagues. There would be an expectation of 1-2 workshops per year, within the timeframe of the contract.

The training-of-trainers workshops should prepare the participants to achieve the action points from the lessons learnt workshop methodology above (“Workshop methodology design”). The workshop should be as interactive as possible and provide the tools and resources to support participants in implementing the learned concepts and techniques effectively.

The workshops should be facilitated by individuals or a team of facilitators who have a documented track record of strong communications and facilitation skills to create an open and participatory environment, as well as the ability to guide participants using practical exercises to reflect, synthesize and translate lessons learnt into actionable recommendations for future improvement. A strong understanding of the humanitarian mandate of UNHCR, its operating environment and the dynamics which could affect a UN agency in the future are essential. While the selected vendor will be expected to take the lead in running the ToT workshop, UNHCR’s ERM Service and the Crisis Communications team will be present to answer any UNHCR specific questions.

Additional task

The selected individuals or team of facilitators could also be requested to co-facilitate actual lessons learnt workshops, if needed. Estimated duration would be approximately four hours, with possible development of a survey and final report, if needed. The cost estimation for the co-facilitation should be separately outlined in the financial offer.

