GHKC
Global Health Knowledge Collaborative

Knowledge Management (KM) Case Study

SUMMARY:

The New Partners Initiative Timesheet Training Series e-Learning modules were designed to allow US Government (USG) partners, and any organization seeking to implement best practices, to establish a timesheet system compliant with USG requirements. Improved financial management systems will enable organizations to be better prepared to receive USG funding to implement future programs. E-Learning was used to transmit training in a consistent way and enable learners to proceed at their preferred pace, while also practicing the concepts.

PROJECT DATES:

August 2011 – February 2012

TARGET AUDIENCE:

Program managers, financial managers, other KM practitioners

FOR MORE INFORMATION:

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The New Partners Initiative Timesheet Module: E-Learning to Support Knowledge Management (KM)

CONTEXT

The US Government (USG) and other international donors recognize the critical importance of partnering with local organizations to address pressing health and social problems facing their countries. While most local organizations have financial and reporting systems in place for their organizations, they are not always adequate to meet the financial and reporting requirements of the USG and other international donor funding. Many organizations are required to develop additional systems to meet such donors' requirements. In response, the USG has implemented a range of capacity building technical assistance (TA) programs to help new partners build up their systems to comply with the terms of their agreements.

Throughout the five-year The New Partners Initiative (NPI) project, development and strengthening of financial management systems were identified as capacity building needs for the partners. Financial TA was the highest priority need of new partners and developing a timesheet system, in particular, was identified by both project staff and grantees as requiring a high level of assistance and repeat visits of financial TA staff on the project. This set of online training modules was developed by FHI 360 staff in the U.S. and South Africa offices to assist USG partners – and any organization seeking to implement best practices – in setting up, reviewing, and approving a timesheet system that is in compliance with USG requirements and generally accepted accounting practices. TA providers can also use this training as a refresher course or as a starting point for their recipients.

NPI is a $200 million program created under the U.S. President's Emergency Plan for AIDS Relief (PEPFAR) to fund work with new USG award recipients, including community and faith-based organizations, to implement HIV/AIDS prevention and care activities in the 15 PEPFAR focus countries. NPI seeks to enhance partners' technical and organizational capacities to provide quality prevention and care to people in need, and ensure these efforts are sustainable by building community ownership. TA provided to partners included an array of skill-building activities via customized assistance and broad-based trainings designed to ensure that skills built during the initiative were institutionalized and sustainable.

SPECIFIC KM ANGLE

Within the larger category of financial management system strengthening, understanding how to set up and ensure proper use of a USG compliant timesheet system was identified as a high priority need of NPI partners. Partner organizations' implementation of timesheet systems varied: some did not have a system, others simply used a sign-in sheet to track staff attendance or tracked staff's hours worked, but did not allocate these hours to the specific projects on which staff worked. Building with the grantees in this area required significant time on the part of the financial TA advisors. USG-compliant timesheets are necessary to

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track employees' hours worked, to provide adequate documentation for salary payments, to allocate these salaries to the respective donors based on the actual hours worked, and to meet donor requirements.

All e-Learning modules include activities to give hands on practice and application of the concepts taught, provide feedback after each activity, and provide the learner with templates and tools to use at their organization. Three modules were developed to walk learners through: 1) the steps to develop a timesheet template for their organization, 2) instructing staff to on how to properly complete and submit the timesheet, and 3) informing supervisors on how to approve a correct timesheet or reject an incorrect one.

AFTER ACTION REVIEW

Monitoring and evaluation

No data is available. The modules were completed in May 2012 and are available on the NPI Connect website (http://www.npi-connect.net/elearning). They will also be distributed on flash drives to relevant stakeholders. The NPI project closes in September 2012, thus these tools are envisioned to carry a portion of the key capacity buildings lessons forward. Any further M&E data will be anecdotal from the stakeholders, though there is no plan for an evaluation given the closure of the project.

What worked well

This project involved staff in the US and country office (South Africa), and responded to an identified knowledge gap among partner organizations. Using e-Learning technology allowed FHI 360 to develop the modules in a format that can be used by anyone as a "just in time" resource to review the specific topics on which they need more information. The interactive activities allow the learner to receive hands-on practice and receive feedback on their responses. This type of TA or capacity building tool is ideal for the self-learner or as a complement to in-person TA.

Challenges and obstacles

Using e-Learning technology facilitated a more interactive presentation of the information; however, at times the learning modalities needed to be adapted slightly to respond to the constraints of the software program (i.e., due to software limitations on the developer's ability to create a specific activity). Given the short time frame for development, and due to the ending of the project, FHI 360 was only able to field test the module with a small number of local organizations in South Africa and Botswana.

How KM contributed

This process engaged staff with a variety of backgrounds and expertise (health, international development, finance, capacity building, curricula development, and web design) to create the final product. It captured the necessary information from a variety of sources including USG regulations, financial best practice documents, and individual staff expertise. Staff experience in working with the target audience was also drawn upon to ensure the modules appropriately address the identified capacity needs. By using e-Learning, we ensured that the modules would allow users to practice and apply the concepts they learned in real time.

Each module in the training series begins with an explanation of the intended audience, the overall purpose, and the learning objectives—that is, what you are expected to learn and be able to do at the end of the module.

RECOMMENDATIONS FOR OTHERS

1. Develop a communication strategy/creative brief to guide the development of the tool.

FHI 360 used a template developed by the Capable Partners Program (CAP) that looked at determining the target audience and their needs, objectives for the tool, mode of delivery of information, and other key considerations.

2. Don't sacrifice learning due to technology.

Choose e-Learning software that has the technological capabilities necessary to properly translate the content into an electronic format; it may be necessary to revise the activities slightly to fit the software requirements, but learning should not be sacrificed to the technology. When choosing software, the developer should consider the target audience, content to be taught, and intended outcomes of the training.

3. E-Learning can best complement other TA services.

For other TA projects, the e-Learning methodology could be considered as one of several approaches to use when providing TA services. TA providers could use this as a starting point to introduce a topic prior to one-on-one TA with an organization, and then address any follow up needs during the TA session. It can also be used to reinforce training or TA; instead of contacting the TA provider for another round of training, the organization can review the module. The module could also be used by the organization independently of the TA provider, as a self-guided learning activity.

4. Conduct pre-testing to enhance usability.

For usability, pre-testing would be recommended as well as having an evaluation strategy in place. A small pre-testing of the timesheet training series was conducted, but for future e-Learning activities with a longer time frame, a broader pre-testing (including piloting with different types of organizations, in various locations) would have been recommended.

This case study was prepared by Caitlin Corcoran, Program and Operations Officer, Global Health, Population, and Nutrition Group, FHI 360.

Informed by real life experiences implementing KM activities within health and development organizations, these case studies highlight strategies, challenges, successes, lessons learned, and recommendations for others. They were written by members of the Global Health Knowledge Collaborative (GHKC) and were produced by Knowledge for Health (K4Health), with support from USAID's Office of Population and Reproductive Health, Bureau for Global Health. The GHKC is a community of practice whose main purpose is sharing and synthesizing knowledge among practitioners of KM within the field of global health and development. K4Health is implemented by the Johns Hopkins Bloomberg School of Public Health • Center for Communication Programs (JHU·CCP) in partnership with FHI 360 and Management Sciences for Health (MSH). Visit www.k4health.org for more info.

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