

# Appeal 2003-2004



International Federation  
of Red Cross and Red Crescent Societies

## FINANCE TRAINING

Appeal no. 01.98/2003

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	2003 (In CHF)
<b>Federation Coordination</b>	442,781
<b>Total</b>	442,781 <sup>1</sup>

### Introduction

#### Overall goal

As part of its Strategy for Change, the International Federation is putting more emphasis on regional structures and is therefore transferring increased responsibility to the regional delegations, delegates and local staff in the field together with the programme managers of the national society. The goal of the finance training programme is to support the decentralization effort by effectively transferring financial skills to programme managers in the field.

The finance training programme was set up in the second half of 2002 to facilitate this change process and the increased involvement of programme managers in all aspects of financial management. During the first six months of its existence, the new finance training programme was designing training modules which will be offered both as an induction for new delegates and to personnel in the field. These modules started to be tested in a pilot phase beginning in September 2002 and feedback is currently being received. Beginning in 2003, the first phase of the finance training programme will be initiated.

**Objective 1** To give field delegates, local staff of the Federation and key personnel from the national societies a good understanding of the financial aspects of the programme management cycle. The different components of this cycle are:

- financial planning;
- budgeting;
- managing income and expenditure; and
- reporting to donors.

#### Activity 1

All new delegates, including heads of delegations coming through the Secretariat in Geneva, will receive a half-day induction course, introducing the new role of the programme manager, defining roles and responsibilities and explaining the financial tools and monitoring systems. The presentation material will be provided to regional finance units (RFUs) for local staff and new programme managers of the national societies working with the Federation's funds and procedures.

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<sup>1</sup> USD 318,965 or EUR 303,463.

It is expected to reach between 100 and 150 participants a year (seven sessions with around 15 to 20 participants) plus additional sessions led by the delegations.

#### **Expected results**

- Clear understanding of roles and responsibilities for all programme managers before starting operating in the field. Full use of financial tools including financial monitoring and reporting system (FMR), BuSy and other specific reporting tools.

#### **Indicators**

- implementation of projects corresponding to planning and funding; and
- timely implementation of field projects, as well as a decreased level of programme deficits; and
- accurate and timely financial reporting to donors.

#### **Activity 2**

Training sessions will take place in the Federation's delegations with the support of the regional finance units who will contribute to both content and presentation of the training modules. Training sessions will consist of a three-day interactive workshop, with case studies and hands-on exercises on the current financial management tools such as FMR.

Each session will host 12 participants, ideally five delegates, five local staff of the Federation and two staff members of the national society managing funds transferred from the Federation. As described below, the proportions will change during phase 2. It is expected to reach approximately 380 participants the first year and the same number the second year. There will be 16 sessions per trainer and will include an average of 12 participants (384).

#### **Expected results**

A solid awareness of financial processes throughout the organization will be established to increase the quality of financial management, develop proactive budget management to avoid creation of deficits, and to increase donor satisfaction. The uniformity of training material throughout the organization will occur.

#### **Indicators**

- implementation of projects corresponding to planning and funding;
- timely implementation of field projects, as well as decreased level of programme deficits; and
- accurate and timely financial reporting to donors.

**Objective 2** Provide information briefing about the programme to all heads of delegations.

#### **Activity**

All heads of delegations will be briefed about the financial aspects of their role and they will receive detailed information about the programme. In addition, informative presentations about the training programme are planned during their semi-annual meetings in Geneva.

#### **Expected result**

The management will support the new training programme, and a total of 60 heads of delegation will be briefed per year.

#### **Indicators**

- Number of participants in training sessions will be an even representation throughout each region.
- Increased interest in sound financial management by the heads of delegations.

**Objective 3** Providing emergency response units (ERUs) and field assessment and coordination team (FACT) members basic financial and management knowledge before going on missions.

**Activities**

The Federation has a network of ERUs which are national society units ready to deliver relief help immediately after an emergency occurs. A special training programme on financial management in emergency situations was prepared and will be presented in order to increase financial skills and understanding. The FACT members who are deployed by the Federation to assess and coordinate the Federation's emergency response will also receive ongoing training.

**Expected result**

Emergency teams will be prepared to work with the financial aspects of an emergency which will contribute to their overall efficiency. The expectation is to run four finance modules per year for 15 participants each.

**Indicators**

There is a fast and easy financial hand-over process with the Federation's delegations in the case of ERUs. Financial interactions between FACT missions and the delegations will be coordinated.

**Objective 4** Train of trainers (ToT) sessions will be provided through the Federation's normal training activities.

**Activity**

Potential trainers will be identified within the regional finance units and among finance delegates and local finance officers who will be provided with training for trainers. Two sessions of ToT will be organized in Geneva specializing in financial matters. In addition, the identified candidates will be sent to the regional ToTs organized as part of the Federation's normal training. This aspect is a key to the success of the programme, as it will be the means to spread knowledge and skills beyond the implementation phase of this project.

**Expected results**

Approximately 30 candidates per year will be able to run financial workshops directly in national societies and delegations.

**Indicators**

The programme will be self sufficient after two years (no trainers required from Geneva).

**Risks and Critical assumption**

Trainees will be made available and encouraged to participate in the programme and that sufficient funding will be received.

**Timing and schedule**

**Pilot phase**

The projected time frame is in the second half of 2002.

**Phase I - 2003**

During the first year, the programme's priority will be aimed at training the Federation's finance delegates (40 per cent) and local staff members (40 per cent), and to a lesser extent national societies' employees (20 per cent). As of January 2003, two trainers will organize eight training missions each. One trainer was hired and started the pilot phase in September 2002. This will help meet the target of reaching 380 participants in the field.

**Phase II- 2004**

This phase will be the maturity phase as the programme will be solidly rooted in the field with greater emphasis on national societies (40 per cent) while efforts continue for training of the Federation's local staff (30 per cent) and delegates (30 per cent). The training of the Federation's delegates needs to be maintained at a lower rate given the short length of delegates' missions.

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# BUDGET 2003

## PROGRAMME BUDGETS SUMMARY

Appeal no.: 01.98/2003

Name: Finance Training

PROGRAMME:

	Organisational Development	Health & Care	Disaster Management	Humanitarian Values	Federation Coordination	International Representation	Total
	CHF	CHF	CHF	CHF	CHF	CHF	CHF
Shelter & construction	0	0	0	0	0	0	0
Clothing & textiles	0	0	0	0	0	0	0
Food	0	0	0	0	0	0	0
Seeds & plants	0	0	0	0	0	0	0
Water & Sanitation	0	0	0	0	0	0	0
Medical & first aid	0	0	0	0	0	0	0
Teaching materials	0	0	0	0	5,000	0	5,000
Utensils & tools	0	0	0	0	0	0	0
Other relief supplies	0	0	0	0	0	0	0
<b>SUPPLIES</b>	0	0	0	0	5,000	0	5,000
Land & Buildings	0	0	0	0	0	0	0
Vehicles	0	0	0	0	0	0	0
Computers & telecom	0	0	0	0	8,000	0	8,000
Medical equipment	0	0	0	0	0	0	0
Other capital exp.	0	0	0	0	0	0	0
<b>CAPITAL EXPENSES</b>	0	0	0	0	8,000	0	8,000
Warehouse & Distribution	0	0	0	0	0	0	0
Transport & Vehicules	0	0	0	0	0	0	0
<b>TRANSPORT &amp; STORAGE</b>	0	0	0	0	0	0	0
Programme Support	0	0	0	0	28,780	0	28,780
<b>PROGRAMME SUPPORT</b>	0	0	0	0	28,780	0	28,780
Personnel-delegates	0	0	0	0	280,000	0	280,000
Personnel-national staff	0	0	0	0	0	0	0
Consultants	0	0	0	0	0	0	0
<b>PERSONNEL</b>	0	0	0	0	280,000	0	280,000
W/shops & Training	0	0	0	0	29,400	0	29,400
<b>WORKSHOPS &amp; TRAINING</b>	0	0	0	0	29,400	0	29,400
Travel & related expenses	0	0	0	0	81,600	0	81,600
Information	0	0	0	0	0	0	0
Other General costs	0	0	0	0	10,000	0	10,000
<b>GENERAL EXPENSES</b>	0	0	0	0	91,600	0	91,600
<b>TOTAL BUDGET:</b>	0	0	0	0	442,781	0	442,781