Case Study 5: Reducing cash-based support to field outreach programs

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Key Points

- Developing a comprehensive process to manage low- to no-cash support for field outreach programs involves a wide range of considerations: planning, procurement, inventory management, distribution mechanisms and reporting.

- The initial activity support package (bus fares, flex cards, refreshments) has to be decided and agreed on before the planning and budget tool can be developed.

- A single Excel-based menu-driven activity planning and budget tool can be used to ensure simplicity, consistency and control of activity planning, budgeting and procurement.

- Each staff member involved in the process must have well-defined and documented roles, with clear guidelines and procedures to follow, and will require intensive on-going technical support.

- Developing and successfully rolling out low- to no-cash support for field activities will represent a major shift in the routine procurement and distribution practices of field office staff. Making this kind of change requires a commitment to the process, demonstrated by persistence and patience and an enormous amount of follow-through. It will take time to absorb and integrate into everyday practice.

Background

Since the beginning of Tingim Laip (2005 HRSS), peer outreach activities have always been financially resourced through a small grants mechanism. Over the years this has been administered in varying ways, but most commonly through direct cash transfer of K500 – K3000 to a 'committee' of volunteers. The transfer of subsequent cash grants was dependent on the accurate and complete acquittal of the previous grant. This approach was ineffective, led to significant delays in activity implementation as 'committees' struggled to complete acquittals, and was an ongoing risk for fraud.

TL aimed to find a way to provide low to- non-cash support for the implementation of field activities in an efficient, cost-effective way, and thereby reduce delays in implementation of activities, as well as risks for security and fraud. To do this, Tingim Laip developed a comprehensive process that started with planning, included procurement, inventory management, distribution mechanisms and reporting. Each staff member involved in the process had well-defined and documented roles, guidelines and procedures to follow, and received on-going technical support.

Rationale

As a peer-led outreach program, TL field teams need to have flexibility, mobility and a degree of informality to meet with their peers at a convenient, and often opportunistic times, in locations where peers lived and worked. They also need to have ways to ensure that their peers were willing to continue to meet with them on a regular basis, without themselves being out-of-pocket for associated expenses. To accommodate this, Tingim Laip provided field team members with:

- Phone credit (flex cards) and bus fares: these allowed field teams to travel to and from field offices for weekly briefings and trainings and to assist peers to get transport to relevant clinical and social service providers. Flex cards allowed field teams to maintain contact with their peers for ongoing support and to plan clinic visits.
- Field team members were also provided with 'refreshment packs' as a mechanism that acknowledged Melanesian cultural practice of 'exchange' – often involving food – to support

peer outreach activities. Refreshment packs generally consist of a non-alcoholic drink, some dry biscuits or rice and tinned meat or noodles.

> "Refreshments aren't just about having a feed and feeling good about it, they also start a conversation and create an environment in which it is conducive for peers to openly interact. A lot of quality information is exchanged between field offices/ volunteers and their peers over refreshments. In Melanesian culture we share things during conversations; refreshments can trigger the conversation. They also show appreciation for the time peers are spending with us."
> *Verna Guise, Project Officer, Alotau*

By providing the actual goods to support outreach, rather than a cash transfer, Tingim Laip eliminated delays associated with procurement and acquittal processes, thereby maintaining ongoing delivery of activities, ensured effective use of resources and time, and delivering the best value for money. This approach removed the need for field teams to handle large amounts of cash, reducing risk to their security and mitigating risk for fraud.

The initial selection of items available had to be carefully planned to allow construction of a menu-driven activity budget to ensure simplicity, consistency and control of budgeting and procurement across all locations. However, the system was flexible enough so that contents of refreshment packs could vary for different target groups, activities or locations.

Process and Tools

Getting started:

Before implementing this set of tools, a few things had to be done:

- Each team member involved in the process had well-defined and documented roles, documented procedures to follow, and received on-going technical support.
- Selection of items to be included in the outreach support package (bus fares, flex cards, refreshment packs). Tingim Laip offered a K5 refreshment pack and K20 lunch pack. Each location team decided what items would be included in these packs within the agreed budget.
- Development of the Excel-based menu-driven activity planning and budget tool (Location Activity Plan – LAP), with three main sections:
  1. Location strategy and target population description
  2. Activity planning calendar
  3. Monthly budget and procurement summaries

With this tool the budget is generated through a series of dropdown menus on linked Excel sheets using agreed standard budget items. For each activity, field teams selected options from the dropdown menu of choices to create each month's budget. The template produced a procurement summary for flex cards and each item included in the refreshment packs, for each month.

For more information on the LAP, refer to LAP template in the toolkit.

Step 1: Planning (quarterly/ monthly)

- Field activity plans were completed on a quarterly basis, using the LAP template. Each month the plans were reviewed in detail and revised as necessary.

Step 2: Procurement (monthly)

- Procurement summaries produced by the LAP were compiled each month into a Grants Inventory Control (GIC) spreadsheet (refer to GIC template in the toolkit). This tool was used by the Field Office Administrator to procure all items required to support delivery of outreach activities for the given month. Based on the GIC, the Administrator was able to obtain quotes and purchase the required goods.

- To expedite procurement processes, goods were bought from the same supplier each month based on a 6-monthly comparative quoting exercise used to identify preferred suppliers.

Step 3: Inventory Management (monthly)

- All purchased items were recorded in the GIC by the Administrator.

- The Administrator then produced a Grants Stock Control Log for each individual item (flex cards, noodles, biscuits, soft drinks).

Step 4: Distribution (weekly)

- Project Officers signed out all items needed by their field teams in a given week using the Grants Stock Control Logs. Refreshment packs were assembled and made available for weekly collection by field team members (Field Officers and volunteers).

- Field team members would sign for goods they received.

- Field team members recorded the distribution of their items to peers on the appropriate distribution forms. Completed records, along with M&E reports, were submitted to Project Officers during weekly briefings, and were required before the next week's supplies could be distributed.
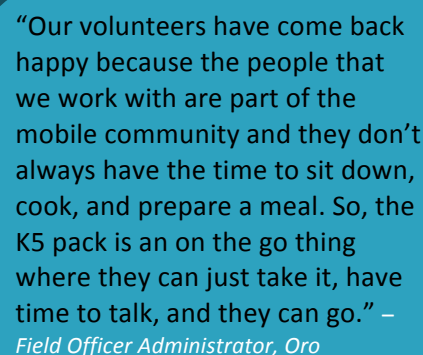
Step 5: Reporting (monthly)

- At the end of each month, the entire grants inventory on-hand was counted by the Administrator and reconciled against the Stock Control Logs and Grants Inventory Control in preparation for the next month's procurement.

Outcomes

1. By 2014 Tingim Laip had rolled out a no-to-low cash system to support field outreach activities. This was part of the rollout of the larger comprehensive system that included a more efficient approach to activity planning, the establishment of procurement procedures, inventory management and distribution mechanisms and a simplified reporting structure.

2. The system removed the need for field officers to handle large amounts of cash, reducing risk to their security and the risk of fraud.

3. The new system supported field work in three other major ways: by eliminating delays in providing support for field activities, respecting the gifting culture in PNG and selecting appropriate commodities for the populations with which Tingim Laip worked.

> "Our volunteers have come back happy because the people that we work with are part of the mobile community and they don't always have the time to sit down, cook, and prepare a meal. So, the K5 pack is an on the go thing where they can just take it, have time to talk, and they can go." – *Field Officer Administrator, Oro*

Benefits

- Appropriate mechanism for outreach to key populations (allowed flexibility and accommodated for mobility)

- Reduced security risk to field staff
- No delays in delivery of field activities
- Refreshments encouraged sharing of information and time among peers
- Bulk procurement of a set menu of items allowed semi-annual comparative quoting, providing better value for money, more effective use of time
- Easier acquittal management for low literacy/numeracy groups

Challenges

- The commodities-based grants system presented a major shift in the routine procurement and distribution practices of field office staff. To support the transition a senior finance and administration officer was sent to each field office to train staff on their roles and responsibilities and use of the planning, procurement and tracking tools. Repeated field visits and intensive remote support were also provided, with senior finance and administration officers designated as ongoing coaches for specific field offices.

  Despite this support, it took longer than expected for the system to become routine practice for field office staff; in some places it took six months for staff to gain competency with the required tasks.

> "The K5 packs are easy to manage, the acquittals before were challenging. Now it's easy, we have the packs there. But it has increased the paperwork, to get a K5 pack you have to fill out so much paper." –
> *Project Officer, Milne Bay*

- Some field workers had to travel long distances to do their outreach. Traveling with a week's supply of refreshment packs was quite difficult.

Lessons Learned

- Reducing cash transfer to field outreach workers reduces delays associated with procurement and acquittal processes, thereby maintaining timely delivery of activities, reducing risk to security and mitigating risk for fraud.
- Systems should be simple, well-tested, stable and understandable by low literacy/ numeracy users in the field.
- Invest in your system. Once in place, provide adequate training and support to users and allow time (at least 6 months) for systems to be learned and integrated into daily work.

  Provide ongoing, regular support and ensure compliance and regular practice of processes.
  Keep changes and / or additions to a minimum while users are in the learning stages – allow them time to become confident with tools, before any refining is done.
- Make sure users understand the entire process and how the tasks they are responsible for contribute to the whole system.
- Communicate, get feedback and follow up.
- Training people with different educational and understanding levels in this kind of system requires persistence and patience and an enormous amount of follow-through. Change takes time to absorb and integrate.