

## How to Teach Basic Financial Management to CBOs

### *A six to nine months training of trainers course, by FHI360*

**FHI360 provides 4 trainings, for a total of six weeks:** (All trainings are held in a 'retreat' environment away from the demands of work). The training comprises the following:

TOT 1- Simplified Accounting (6 days), Candidates learn the basics of the specially designed simplified accounting system – Basic Financial Management for CBO's.

TOT 2- How to teach simplified Accounting (6 days), Candidates practice teaching simplified accounting to each other using an FHI360 produced manual for Basic Financial Management for CBO's

TOT 3- Practicum: Basic Skills (with CBOs) (12 days), Candidates practice teaching CBOs the basic skills of simplified accounting system (cash book, bank book, income and expense ledger, cash advance, among others)

TOT 4- Practicum: Intermediate Skills (with CBOs) (12 days), Candidates practice teaching CBOs the intermediate simplified accounting system (cash reconciliation, bank reconciliation, trial balance, financial reports, donor contracts, budget management)

### **FHI360 provides On- Going Support to Candidates (six to nine months)**

Between and after the trainings, FHI360 provides ongoing support to ensure the candidates have a solid understanding of the simplified accounting system and that they are effectively transferring their knowledge to CBOs.

This includes site visits and ongoing telephone and email support to address any questions and concerns that arise, exercises are given, and periodic inter- exchange workshops.

### **FHI360 provides Certification:**

First, the candidate must

- ✓ Attend TOT 1&2
- ✓ Pass the first simplified accounting test (tests will be given more than once for those who fail), and receive a certification of participation. This will allow candidate to enter training for certification as a mentor  
To be certified as Mentor, Candidates must
- ✓ Successfully complete the 4 trainings
- ✓ Demonstrate their mastery of simplified accounting by passing accounting tests and exercises throughout the 6-9 months
- ✓ Show evidence of success in their 6-9 months of field work with their CBOs (they must demonstrate consistent and proper use of our field guide, and CBO monitoring tools: Baseline, three month plan, site visit reports, progress reports)

During this process of training mentors, FHI360 will select candidates that demonstrate capacity to be trainers. These will receive specialized training that will produce a pool of master trainers.

### **Your organization provides**

Full time staff who are able to make the time and commitment necessary to participate in this six to nine months training course.

They must be able to:

- ✓ Take time away from work to attend the 4 trainings ( 6 weeks )
- ✓ Visit each of their CBOS a minimum of 2 times a month, for 4 hours each visit, for at least 6 months
- ✓ Have basic knowledge of bookkeeping and/or basic mathematics.