CB ASSESSMENT CHECKLISTS

CHECKLIST #5:
Developing and Conducting a Time Study

This is an alternative to a retrospective time study.
The steps for a retrospective time study can be found in Checklist #6.

Step 1: Reflect

☐ **1:** Reflect on learning priorities
Reflect on the **learning objectives** of the assessment identified in Section 1.

Step 2: Define categories

☐ **2:** Define the activities staff should track
Define the capacity building **categories and/or activities** you would like staff to track based on the definitions created in Section 1. Consider whether you would like to track time spent on capacity building efforts by methods of administration (e.g., phone calls, emails, in person meetings), types of activities (e.g., coaching, workshops, direct and/or support/indirect) and/or topics (e.g., applying for grants).

Step 3: Determine participants and time period

☐ **3:** Determine participants and time period
Determine **who will participate** and the **time period** of the study. Will all staff participate or only a sample? Should any contractors or volunteers be included?

Step 4: Create timesheets

☐ **4:** Create tools for staff to track their time
Develop **timesheets and instructions** for staff to track their time (see example in Appendix C).

Step 5: Collect feedback on materials

☐ **5:** Gather feedback on materials from the advisory group
Test the materials and **refine them based on feedback** from the advisory group.

Step 6: Conduct training

☐ **6a:** Train all staff
Frame the training with **the purpose of the study and benefit** to the agency, departments and/or staff

☐ **6b:** Share common definitions
Take time to **share common definitions for capacity building activities** on the time sheet and develop a common understanding of capacity building (based on Step 1). Remember that this may be the first time for some of the staff to engage in this type of discussion so provide ample time for questions.

☐ **6c:** Utilize external consultant to conduct training
If hiring an external consultant, it may be helpful to **have them conduct the training** to emphasize the importance and reduce any power struggles between staff.

☐ **6d:** Incorporate and discuss scenarios during training
Include **real scenarios and practice time** during the trainings to ensure clarity. For example, ask them to track their last few days in the time sheet to see what questions arise.

Step 7: Collect data

☐ **7a:** Determine timesheet submission process
Provide an easy and accessible way to submit timesheets (i.e., via email or saved in a folder on a shared drive) on a regular basis (once or twice a month at minimum).

☐ **7b:** Do quality assurance
Assign one person to conduct quality checks on each timesheet to catch errors right away so staff can fix them while they still remember their time

☐ **7c:** Provide incentives and reminders
Provide **incentives and regular reminders** to keep the study fresh on their minds – consider adding the time study as a standing item at staff meetings to reflect on what staff are learning and as a reminder to keep it up. This will require buy-in from leadership. **Consider incentivizing groups instead of individuals** (e.g., give tickets to everyone who turns it in on time that gives them "admission" to a pizza party later that week, rather than just a prize to the first person who turns it in).

☐ **7d:** Allow for oversight time and resources
Recognize that conducting quality checks and providing incentives take **staff oversight time and resources**. Incentives also require thoughtful consideration of how to motivate staff and time to seek approval of and obtain the incentives.

Step 8: Analyze data and share findings

☐ **8a:** Present findings frequently
Consider **presenting findings to date on a quarterly basis** to keep staff engaged and informed and remind all of the utility of the data. If the time study only covers three months, present the data at the midpoint of the data collection period.

☐ **8b:** Link findings
Link findings to other capacity building assessment efforts (if applicable) to **present the bigger capacity building picture.**