

PA - ABK - 10
1000

HAP ORGANISATIONAL DEVELOPMENT SERVICES

This is to certify that:

**attended a five-day course in Organisational
Development and Management for NGO's from
22 to 26 June 1992.**

The course covered:

- * Strategic Planning
- * Managing People in NGO's
- * Budgeting
- * Proposal Writing

BENITA PAVLICEVIC
Head of Training

HAP ODS
P.O. Box 261604
EXCOM - 2023

SUMMARY OF EVALUATIONS OF ABEL WORKSHOP

Please rate each session on a scale of 1 - 5

- 5 = Very useful, excellent
- 4 = Useful, good
- 3 = OK
- 2 = Not really useful
- 1 = A waste of time

	Rating		
	3	4	5
Strategic Planning	1	9	24
Management of People	1	10	24
Budgeting	1	7	25
Proposal Writing	4	7	22

Please give comments on the planning and design of the course.

- *Good participation*
- *Well designed*
- *variety of methods*
- *was absolutely filled with awe at the ease and comfort with which we sailed through the course.*
- *enjoyed small groups*
- *well planned*
- *could involve participants with specific knowledge for input sessions*
- *Well prepared*
- *Changing political climate needs to be considered.*
- *Very different from previous seminars and most useful.*
- *It was excellent.*

Please give feedback on the facilitators: (please say who facilitated your

small groups and give feedback on each one)

- *Good*
- *Encouraging*
- *Supportive*
- *Good time keeping*
- *All great*
- *Excellent*
- *Very professional*
- *Well informed*
- *Worked well as a team*
- *Allowed the discussion to stray*
- *Could have been more directive*

Please give feedback on the manual (please be as specific as possible).

- *Looked very frightening, but contained valuable material. I liked the idea of proposed forms etc.*
- *Well prepared*
- *Valuable*
- *Readable*
- *Typing and spelling mistakes needed to be corrected*
- *Useful case studies*
- *Useful reference*
- *Would like example of a proposal*
- *More examples of job descriptions.*
- *Very effective*
- *Excellent*

Thanks for blank sheets to write on.

What did you learn in this course that you will be able to implement when you get back to your organisation?

- Strategic Planning - various facilitation techniques
- Management of People
- Budgeting
- Proposal Writing

What did you find disappointing about the course?

- *Revised starting time not clearly told to participants. Durban participants were stranded at the airport.*
- *All participants should have been resident*
- *Very tired by the end of the day*
- *Would like a mid-programme break*
- *Planned excursions*
- *Chance to debate politics.*
- *Neglected the Human Resource Planning Process and its relationship to Strategic Planning.*

Any other comments?

- *Thanks*
- *Stimulating, informative and fun*
- *Want a follow-up*
- *Useful to work with other NGO's*
- *A bit slow*
- *Needs analysis necessary*
- *Needed a session on management boards*
- *Would have liked A-V equipment to capture special events.*
- *Difficult content came alive through participative methodology. Group work was innovative and productive.*
- *"Abel was fortunate to have been able to secure such an able agency as HAP. Congratulations!"*
- *Good to meet other NGO's*
- *When can I come again?*
- *"We suggest" phrase used often. HAP did not impose.*
- *Would like HAP to be more pro-active, not to wait for requests.*

ABEL WORKSHOP DELEGATES

*** BORDER EARLY LEARNING CENTER(BELC)**

Ms Xolelwa Mbilase (Fieldwork Co-ordinator)

Ms Nikki Florence (Project Co-ordinator)

ADDRESS : 50 Albany Street
East London
5201

TELEPHONE NUMBER : 0431-20723

FAX NUMBER : 0431-431408

*** EDUCATION FOUNDATION**

Ms Laura van Wyk (Aministration / Finance)

ADDRESS : P O Box 2925
Durban
4000
13th Floor Fedlife Building
320 Smith Street
Durban
4001

TELEPHONE NUMBER : 031-305-2401

FAX NUMBER : 031-305-5571

*** ENGLISH LANGUAGE EDUCATION TRUST(ELET)**

Mr Mervyn Ogle (Director)

Mr Cecil Flynn (Courses Co-ordinator)

ADDRESS : 6th Floor Methodist Church Building
74 Aliwal Street
Durban
4001

TELEPHONE NUMBER : 031-320-501

FAX NUMBER : 031-320-504

*** EARLY LEARNING RESOURCE UNIT (ELRU)**

Ms Rosalind Herbert (Acting Director)

Mr Paul Daniels (Accountant on Board)

ADDRESS : All Saints Parish Center
37 Denver Road
Lansdowne
7764

TELEPHONE NUMBER : 021-696-4804

FAX NUMBER : 021-697-1788

*** THE EDUCATIONAL SUPPORT SERVICE TRUST (ESST)**

Mr James Olivier (Co-Director)

Mr A Mshumpela (Co-ordinator)

ADDRESS : P O Box 144
Muizenberg
7975

TELEPHONE NUMBER : 021-455-525/6/7

FAX NUMBER : 021-461-4198

*** FORUM FOR ADVANCEMENT OF ADULT EDUCATION(FAAE)**

Mrs Dee Roup (Co-ordinator)

Ms K Mazibuko (Evaluator / Project Researcher)

ADDRESS : 3rd Floor Sable Center

41 De Korte Street

Braamfontein

2001

TELEPHONE NUMBER : 011-339-6322/3

FAX NUMBER : 011-339-7762

GRASSROOTS EDUCARE TRUST

Mr Phillip Balie (Fundraiser)

Mrs Miriam Du Toit (Finance / Admin manager)

Mrs G Hasiem

ADDRESS : P O Box 38055

Gatesville

7764

335A Klifontein Road

Silvertown, Athlone

7764

TELEPHONE NUMBER : 021-638-3111

FAX NUMBER : 021-637-3011

*** IKEMELENG REMEDIAL CENTER**

Ms Sanku Molaoli (Director)

Ms Carol Tshoaedi (Public Relations)

ADDRESS : 6503 Orlando East

Cnr Adams & Mooki Streets

P O Box 30401

Wibsy

1717

TELEPHONE NUMBER : 011-935-1491

FAX NUMBER : 011-935-1491

***INDEPENDENT TEACHER ENRICHMENT CENTRE (ITEC)**

Mr Dumile Mzaidume (Project Co-ordinator)

Mrs Noelene Barry (Project Co-ordinator)

ADDRESS : 8 Park Avenue

East London

TELEPHONE NUMBER : 0431-438-333

FAX NUMBER : 0431-29-263

*** MATHS CENTRE FOR PRIMARY TEACHERS**

Mrs Jean Patchitt (Director)

Mr Themba Tshongwe (Teacher Facilitator)

ADDRESS

PO BOX 117

Auckland Park

2006

TELEPHONE NUMBER : 011-726-1510

FAX NUMBER : 011-726-8626

*** NATIONAL EDUCATION COORDINATING COMMITTEE (NECC)**

Mr James Maseko

Ms Barry Pule

ADDRESS : 2nd Floor Khotso House
62 Marshall Street
Johannesburg
2001
P O Box 62027
Marshalltown
2107

TELEPHONE NUMBER : 011-836-4726/7/8/9

FAX NUMBER : 011-836-6971

*** NTATAISE**

Ms Winnie Mashaba (Natal Region)

Ms Bonny Ntsoeleng (Viljoenskroon)

ADDRESS : PO BOX 41
VILJOENSKROON
9520

TELEPHONE NUMBER : 01413-33311/22

FAX NUMBER : 01413-32922

*** PROJECT LITERACY TRUST (PROLIT)**

Mr Charl Marais (Deputy Director)

Ms Pat Dean (Management / consultant)

ADDRESS : 350 Lynnwood Road
Lynnwood
Pretoria
0081

TELEPHONE NUMBER : 012-348-4003

FAX NUMBER : 012-348-4003

*** PROTEC**

Ms Libby Kaberry (Sasolburg Branch Co-ordinator)

Mr Jerry Dikgale (Modderfontein Branch Co-ordinator)

ADDRESS : P O Box 52657
Saxonwold
2132

TELEPHONE NUMBER : 011-788-7209

FAX NUMBER : 011-880-1795

*** QHAKAZA**

Dr M. James Hlongwane (Administrator)

Mr D.K. Miya (Administrative Assistant)

ADDRESS : Craftsman Center
1st Floor
289 Fox Street
Jeppestown
2094
P O Box 273
Wits, Braamfontein

TELEPHONE NUMBER : 011-618-4587/8

FAX NUMBER : N/A

*** RETSWELETSE**

Rev Ezekiel Sephiri (Co-ordinator)

ADDRESS : C/O GET AHEAD FOUNDATION
PO BOX 3776

PRETORIA
0001

TELEPHONE NUMBER : 012-342-2196

FAX NUMBER : 012-434-952

*** SOUTH AFRICAN ASSOCIATION FOR EARLY CHILDHOOD EDUCARE (SAAECE)**

Ms Debby Leshope (Administrator / Secretary)

Mrs Kate Sibeko

ADDRESS : 4 Tulleken St
1st floor
Tulleken Forum
P O Box 673
Pretoria
0001

TELEPHONE NUMBER : 012-322-0601/2

FAX NUMBER : 012-322-9379

*** SOUTHERN CAPE LEARNING RESOURCE UNIT (SCLRU)**

Mr A J Lamont (Program Director)

ADDRESS : P O Box 447
George
6530
11 Mission Street
Pacaltsdorp
6534

TELEPHONE NUMBER : 0441-82013

FAX NUMBER : 0441-781000

*** SMALL BEGINNINGS**

Ms Maureen Laubscher (Nelspruit Branch Co-ordinator)

Ms Elaine Davie (Project Director)

ADDRESS : 1st Floor Pine Square
Cnr 18th & Pinaster Strs
Hazelwood
Pretoria
P O Box 88
Groenkloof
Pretoria

TELEPHONE NUMBER : 012-346-3820

FAX NUMBER : 012-346-3656

*** TRAINING IN ENGLISH LANGUAGE AND LITERACY (TELL)**

Ms Hazel Mthitshana

ADDRESS : P O Box 32485
Braamfontein
2017
205 Dunwell House
35 Jorissen Street
Braamfontein
2001

TELEPHONE NUMBER : 011-403-2660/1

FAX NUMBER : 011-403-2660/1

*** TREE**

Mr Snoeks Desmond (Director)

Ms Virginia Sikakana (Area Co-ordinator for Northern Natal)

ADDRESS : P O Box 35173
Northway
Natal
4065

TELEPHONE NUMBER : 031-845-314

FAX NUMBER : 031-837-767

*** WESTERN CAPE HOSTEL DWELLERS TRUST (WCHDT)
(UMZAPO DEVELOPMENT PROJECT)**

Mr Mxolisi Tolbat (Fieldworker)

Mr Super Nkatazo (Member, Board of Directors)

ADDRESS : C# Cottage, Lower Campus
Private Bag
University of Cape Town
Rondebosch
7700

TELEPHONE NUMBER : 021-650-3601

FAX NUMBER : 021-650-2138

OTHER DELEGATES (NON-ABEL GRANTEES)

*** AFRICAN INDEPENDENT CHURCHES YOUTH PROJECT**

Mr Sam Sebeng (Assistant Director)

TELEPHONE NUMBER : 011-333-7747

*** KING LUTHULI TRANSFORMATION CENTRE**

Mr Tsietsi Thandekiso (Director)

TELEPHONE NUMBER : 011-403-1731/2

FAX NUMBER : 011-403-1942

*** LAWYERS FOR HUMAN RIGHTS**

Mr Reeves Mabitsi

TELEPHONE NUMBER : 012-21-21-35

FAX NUMBER : 012-325-6318

*** MFULENI CENTRE FOR THE AGED**

Ms Rita Jardine (Organiser)

ADDRESS : c/o 10 Lorna Avenue
GLENHAVEN
BELLVILLE 7530

TELEPHONE NUMBER : 021-951-2713

*** C.D.P.A. FUNDA CENTRE**

Mr Kenny Nkwanyana (Co-ordinator)

TELEPHONE NUMBER : 011-938-1485/1770/1/2
FAX NUMBER : 011-938-7439

*** RURAL ADVICE CENTRE**

Ms Miemie Sesoko (Director)

TELEPHONE NUMBER : 011-337-6170
FAX NUMBER : 011-337-8966

*** S.A.B.S.W.A**

Ms Nokuzola Mamabolo

TELEPHONE NUMBER : 011-836-6553
FAX NUMBER : 011-834-3661

*** S.A.A.N.C.**

Ms Deidre Moyce

TELEPHONE NUMBER : 011-674-5405
FAX NUMBER : 011-674-5485

REPORT : ABEL WORKSHOP 22 - 26 JUNE 1992

Aim of workshop

When Abel requested a proposal, they outlined a two-phase process.

Phase 1: Intensive 5-day workshop
Phase 2: Follow-up and support of weaker grantees.

We were asked to put in a proposal for phase 1.

In our proposal we defined the **objectives** of the workshop as:

- 1 By the end of the intensive workshop grantees will have an overview of organisational development and planning issues relating to:
 - Strategic Planning;
 - The management of human resources in NGO's;
 - Preparing a budget and
 - Writing and Submitting successful funding proposals.
- 2 Stronger grantees will be able to identify and solve some of their organisational problems related to the issues listed above.
- 3 Weaker grantees will have an overview of these areas, but they will need a follow-up process of training and support.

Target group

The **target group** was the management level of the staff of NGO's who are Abel grantees. We asked the organisations to send two participants each, ideally at the level of their directors, or regional directors/heads of departments in the case of bigger organisations.

In the event, we were asked to also accommodate non-Abel grantees who were either USAID grantees, or groups Abel had assisted.

The full list of participants is appended.

A breakdown of the participants show the following:

Type of organisation:

Educare	8
Teacher support	6
Student support	2
Adult education/literacy	3
Schools	2
Other: Abel grantees	1
Other: Non-Abel grantees	8
<hr/>	
Total number of organisations	30

Role of participants

Co-ordinator/Director	12
Regional/Departmental co-ordinator	21
Admin/finance	8
Other (PR,Fundraising)	7
<hr/>	
Total number of participants	48

On the whole the correct "level" of person was sent, although there were marked differences of skill, experience and length of time in the job. This meant that some individuals were much weaker than others. Also, because the organisations are so varied, some directors have far greater responsibilities (eg in terms of budget, staff, span of work supervised) than others.

This mix was both useful, and problematic: useful because people learned from each other but a hindrance when "weaker" people ended up in a group together and felt overwhelmed by the task, as happened on the day spent on Budgeting.

Process Observers

Every day two participants were chosen to be "process observers". Their task was to survey participants (eg by interviewing them) and to get a feel for how they were finding the process.

Process observers started the day by giving a 5 - 10 minute report on the observations they had collected on the previous day's programme.

The process observers reports allowed us to be very responsive to dissatisfaction, and to adjust as necessary.

The "assessment" sections of this report are based on the process observers' reports and on the final evaluation.

Detailed Programme

INTRODUCTORY SESSION

Monday 10:30 - 12:30

Objectives

1. To introduce participants to each other
2. To introduce the programme and the major issues the course will cover.

Methods used

1. An ice breaker was used to group and re-group people randomly, to allow them to meet each other and share expectations.
2. A case study was used to surface the kinds of issues we intended to deal with and to ask participants to discuss what problems they experience in their organisations (Pages 8 - 10: manual)

Assessment

Process observers reported that the ice breaker helped participants to relax and get to know each other quickly, and the case study reflected a reality they could immediately recognise. It helped them to focus quickly on the issues the course sought to cover.

STRATEGIC PLANNING

Monday 1:30 TO Tuesday 12:30 pm

Objective

To introduce the basic concepts of strategic planning and to explain why strategic planning is useful.

Method

1. Session on **Strategic Planning**

Participants were asked to choose one of two options:

- a. Participants who felt they understood strategic planning were grouped together and asked to share **how** they plan, and then to prepare a presentation on how to do a strategic plan, using one of the organisations in the group as a case example. (Two groups of about 10 each were formed)
- b. Participants who felt that they do not know enough about strategic planning attended an input session on the main steps (see manual pages 13 to 26)

The presentations from the first group were used to concretise the strategic planning process, and to illustrate the different ways it can be done.

2. Session on **Action Planning**

Participants were given a further two options:

- a. To work on the PHC Trainers Case Study and do an Action Plan based on one or two of their objectives (Page 21 and 22 of the manual)

or

- b. To choose one objective of the Case Study and work out: what **impact indicators** could be used to assess the impact, what **information** would need to be collected and **how** it would be collected and stored.

These options were pursued in groups of about 12 participants.

Groups reported in plenary.

Assessment

1 Strategic Planning

Process observers reported that participants who chose the first **strategic planning** option (1 a above) found that they learned a great deal from each other. In the report back session one group in particular presented a very useful case example, which helped to concretise the "theory".

Participants who chose the second option found the input useful, but would have liked a chance to "try out" the steps. This was not possible due to lack of time.

A couple of participants complained that there was too much lecturing. One commented that this session had changed the way he thinks about organisations.

2 Action Planning

Process observers reported that the participants found that the tasks set were difficult and frustrating, as the case study did not provide enough information, but that, nevertheless, they got a better understanding of the processes described in theory.

Many participants found the section on impact indicators to be very challenging and eye-opening.

MANAGEMENT OF PEOPLE IN NGO'S

Tuesday, 1:30 TO Wednesday, 4:30

Objective

To introduce a coherent approach to managing people in NGO's, in particular: The employment contract selection and induction, and supervision, performance standards and performance appraisals and discipline and grievance.

Methods

1. Case Study: Losing Jon (Page 28 to 30, manual) raised the problems that organisations have with managing people.
2. Input on employment contracts, selection, job description and induction programme.
3. Group work: participants could choose one of three options:
 - a. How would you go about trying to replace Jon?
Describe the process; then develop an application form and interview questions for the selection panel to use. Prepare a role play as part of your presentation.
 - b. Develop a Job Description for Jon. Describe the process you would go through to develop this job description. Describe how you would use the job description both in the process of selection and after.
 - c. Work out an induction programme covering the first two months, for Jon. Develop the programme in such a way that it introduces Jon to the organisational culture, the systems that operate and to the major aspects of his work. Feel free to be creative with people's names and titles and with your description of what the Institute does.

There was a plenary report back session, which included a short skit on induction presented by one group.

4. Input on supervision, setting performance standards and discipline and grievance procedures (manual pages 41 to 58)

5. Group work: Participants could choose one of three options:
 - a. skills training on supervision
 - b. working on setting performance standards.
 - c. case study on a disciplinary issue.

There was no report back session.

Assessment

Process observers reported that participants found the session extremely useful and relevant. Some were disappointed that we had no reports on the second group sessions.

BUDGETING

Thursday 8.30 am to 4.30 pm

Objective

To give an overview of key issues in drawing up a budget and monitoring spending.

Methods

1. Skit: A budget gone wrong
2. Led discussion/Input: The budgeting process
3. Group work: developing budget categories for each year, for PHCT, based on the objectives on page 21 and 22 of the manual.

Groups reported on the **process** they would use to budget, and on the **categories** they would include in their budget.

4. Case Study on a budget gone wrong (Page 66 : manual)
5. Group work: variance report exercise (Page 67 - 71 : manual)

Report : one group presented a role play of the "director" explaining the variance report to the "Board"

Assessment

Process observers reported that participants had found the day very interesting. They had come expecting to be bored, found the first group exercise difficult but ended up by enjoying the day. Participants said that budgeting came alive.

PROPOSAL WRITING

Friday: 8.30 am - 4.30 pm

Objective

To teach participants how to plan and structure proposals.

Methods

1. Case Study: This exercise asked participants to put themselves in the place of a funder and to work out what they would want to know about a project.
2. Group work: Participants worked on one of three tasks:
 - a. a proposal for the evaluation of PHCT training programme.
 - b. a proposal to introduce PHCT to the hospitals and to persuade the hospitals to host PHCT's training programme.
 - c. a funding proposal of their proposal.

Assessment

Although there were no process observers, participants verbally reported that they had found the session useful. A few commented that they would have liked examples of proposals in the manual.

OVERALL EVALUATIONS

All participants were asked to fill in an evaluation form.

A summary of responses in appended.

HAP ASSESSMENT OF THE COURSE

When we put in our proposal for running this training workshop, we made it clear to Dr Jansen and Dr Reddy that we felt that a course such as this one would not be very effective without follow up. We found the idea of preparing this level of training for so many participants from so many organisation challenging and a bit daunting.

Problems we anticipated were:

- Different levels of participants and organisations
- Design problems resulting from the large numbers of participants
- The limited value of training without adequate follow-up.

Before the workshop, we tried to work out how to group participants according to criteria like the size of the organisation, the length of its existence (assuming that older organisations would be better organised), the kind of work it did etc. In consultation we Dr Jansen, we concluded that grouping the organisations would not be necessary as long as the course design allowed participants to find their own level.

Our assessment is that the design of the workshop allowed maximum participation and also allowed the participants to select options that they felt would be most useful for them, and that our decision not to select the groups ourselves was the correct one. There were a couple of participants who seemed almost totally lost, but on the whole, people participated actively in group sessions and plenaries.

We also found that the strength of the organisation was not as relevant as the strength of the actual participants who were sent by the organisation. In other words a "weak" person from a "strong" organisation was much "weaker" than a "strong" person from a "weak" organisation.

Although the evaluations and the process observers' reports were overwhelmingly positive, we find it difficult to gauge the success of the course. This is because the "proof of the pudding" will be in the implementation. We believe that ABEL will need to follow up in three months time, with at least a questionnaire and preferably with phone or face-to-face interviews checking what practical difference the workshop has made.

As to offering follow-up to weaker grantees, we believe that this is a crucial phase, that needs to be implemented. We are not sure how ABEL intends to choose the weakest grantees - our suggestion is that you allow a degree of self-selection to occur: ie you set up criteria which help you to decide what requests for help you will answer positively.

Of the ABEL grantees, the following is a rough sort, in our opinion. Please note that it is necessarily skewed by our experience with the **participants** who may not reflect the strength of weakness of their organisation adequately.

Relatively strong grantees	Relatively weak grantees
BELC ELET ELRU ESST Forum for... Adult Education GRASSROOTS ITEC Maths Centre → Prolit Protec SAAECE TREE →	Ikemeleng Remedial centre NECC Ntataise Qhakaza Retsweletse Small Beginnings TELL Western Cape Hostel Dwellers Trust

* Note that Laura van Wyk of the Education Foundation was ill from Wednesday to the end of the course, making it very difficult for us to assess the Education Foundation.

A note on admin

As Contractors, we found the whole administrative side of the course a bit of a nightmare. This was in no way due to ABEL staff, who were on the whole helpful and friendly, but due to the lack of guidelines. We did not know, for example whether we were submitting a "Scope of Work" or a "Proposal" and in the event, ended up doing both. There were no guidelines as to how proposals, budgets, or reports were to be written, which meant that our documents were returned over and over again for rewrites. While we take some responsibility for this, we believe that detailed guidelines would have made everyone's (at HAP and ABEL) lives much easier.

Conclusion

Overall, we found that the experience was positive for HAP. The training team enjoyed a rare opportunity to pitch training at a management level. It afforded us an opportunity to do some research and development of material which will become a valuable resource for HAP (not ignoring the fact that the copyright rests with AED or USAID).