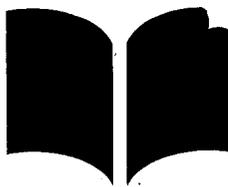


PN-ABY-006
ISBN 98372

ABEL 2



Advancing Basic
Education and Literacy
Phase 2

**REPORT TO PARTICIPANTS AT THE:
ABEL NGO SUSTAINABILITY
WORKSHOP**

JULY 17-21, 1995

Conducted by

The ABEL 2 Consortium
Academy for Educational Development with
Creative Associates International, Inc.,
Educational Development Center,
Florida State University,
Harvard Institute for International Development,
and Research Triangle Institute

Conducted for

Office of Field Support and Technical Assistance
Center for Human Capacity Development
Bureau for Global Programs, Field Research, and Support
U.S. Agency for International Development
Contract No. HNE-5832-C-00-4075-00

Report to participants at the

ABEL workshop

Dates: 17 - 21 July 1995
Venue: Eskom Conference Centre
Facilitators: Beryl Levinger and Davine Thaw
Prepared by: Noki Pakade

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1. Process

DAY 1

1. Welcome and Introductions

Julie Reddy from ABEL welcomed participants and introduced facilitators.

2. Introducing the workshop

Beryl introduced

- Why we are here and what we are going to do.
- How we are going to work, mentioning that facilitators will not lecture, but rather assist participants in reflecting upon their experiences, share concerns and ways to address the changing funding environment.
- The purpose of day 1 as follows; participants will:
 - (a) Get to know each other fairly well;
 - (b) Identify their expectations of this workshop;
 - (c) Explore and share their experience of the external environment;
 - (d) Identify sources of finance/funding appropriate for their work.

3. Group introductions (the Gestalt approach)

- Davine introduced the process and the aim of the exercise.
- Participants moved around and formed various groups according to categories set by facilitators.
(see appendix 1)

4. Expectations and concerns

- In groups of 4, participants discussed the following statements and wrote their responses on cards (*see appendix 2*)
 - (a) As an NGO I am really angry that....
 - (b) If only other people understood that our strengths are...
 - (c) We think that what we have to do is....
 - (d) So at this workshop we would hope to....

- Facilitators noted observations and summarised what was emerging from the concerns of participants on newsprint (*see outcome 1 & 2*)

5. Looking at the external environment

- Participants were grouped into sectors and discussed issues around external opportunities and blockages and ways these could be addressed (*see appendix 3*)

DAY 2

6. Feedback from the environmental analysis

- The 7 sectoral groups on reported on. The action steps they should take to respond to the external environment (*see appendix 4*)

7. Developing case statements

This process was comprised of 3 steps, namely:

- (a) Input on what are case statements and how to develop them using 11 principles;
- (b) Analysis of a case study in groups; and
- (c) Developing a case statement in sectoral groups. *See appendix 5: Elements of a good case statement and A sample case statement for critical analysis*

8. Developing platforms

- This process comprised 3 steps, namely:
 - (a) Input on 'what are platforms' and steps to develop them,
 - (b) Analysis of a case study in groups and
 - (c) Developing a platform in sectoral groups. *See appendix 6: Building a platform and creating alliances and Sample platform: The League of Community Housing Associations.*

9. Readings on marketing were distributed to form the basis of the following day's discussion on marketing.

DAY 3

10. Overview

Davine gave a summary of day 1 and 2 (*see appendix 7*)

11. Feedback on platform statements

- Participants reported on platforms they had developed (*see appendix 8: an example of a platform the ECD sector*)

12. 4 broad areas

- A plenary discussion around marketing was held using the following question;
- *Why did you not use marketing approaches before?* (*see appendix 9*). The results of the discussion was an agreement to focus on the following:
 - (a) Contracts and tendering;
 - (b) Developing marketing plans;
 - (c) Costing and cost effectiveness;
 - (d) Alternative funding.

13. A panel discussion on marketing

- 6 volunteers offered their experience in marketing through a panel discussion. The questions from the interviewer were:
 - (a) What were you marketing?
 - (b) Why were you marketing the product?
 - (c) What strategies did you use?
 - (d) Who needed the product?
 - (e) Did you have a plan?
 - (f) How much did it cost you?
 - (g) Was there any resistance inside your organisation?

DAY 4

14. Summary of day 3 (see *appendix 10*)

15. Divided into 2 separate workshops

This day was divided into 2 workshops, run concurrently and each run twice. The ABE group attended the costing and tendering workshop in the morning while the Educare group was in the marketing workshop. Groups swapped workshops in the afternoon. The 2 workshops were:

- **Developing a comprehensive approach to marketing, which covered the following areas;**
 - (a) Place;
 - (b) Deciding on the **product**;
 - (c) Developing a **pricing strategy**;
 - (d) Developing a **promoting strategy**;
 - (e) Evaluation.

(see *appendix 11: Guide to developing a comprehensive approach to marketing*) and

- **Costing and tendering, which covered the following areas:**
 - (a) contracting
 - (b) forming suitable structures to deliver
 - (c) Developing indicators for delivery
 - (d) Costing resources

(see *appendix 12: cases on ABET and Educare*)

DAY 5

16. **Summary of day 4** (see *appendix 13*: Summary of day 4 and 5)

17. **Final action steps**

The final group work was aimed at
 - Developing Specific, Measurable, Achievable, Realistic and Time bound action steps (SMART). (See *outcome 3*)

 - Enhancing organisational and individual reflection upon the 5-day process

18. **Themes developed in the workshop** (see *outcome 4*)

19. **Evaluation** (see *appendix 14*)

2. Outcomes

OUTCOME 1

Outcome 1 is a synthesis of the group's feelings about:

1. **What they are angry at and the response was as follows;**

- A sense of being sidelined and used
- A sense of blaming someone else
- A fear of being abused
- A need to assert own identity and be independent from government
- Sadness at the loss of skilled people
- A sense of not wanting to allow victimisation
- A need to acknowledge anger and not feel guilty about it
- Rift between government and NGOs
- A sense of self righteousness (debatable)

AND

2. **What needs to be done at the workshop and later. The group's response was as follows:**

2.1. **At the workshop**

- Talk about partnerships beyond finance;
- Learn about alternative funding strategies;
- Develop introspection and recognise weaknesses;
- Find solutions not just share problems;
- Look at legal implications of income generation;
- Do cost effectiveness;
- Learn performance indicators;
- Debate viability of continuing group donor funding.

2.2 **In our organisations**

- Balance internal and external and reassess our strengths (what we do best, not what we were coerced to do;
- Develop new action plans to phase out donor funding;
- Distinguish different roles of NGOs;
- Carry actions from this workshop to our organisations;
- Lobby and make a case to ensure government does something.

OUTCOME 2

Themes developed in Day 1

As a result of the discussion in *outcome 1* participants agreed that there is therefore a need to:

- Develop better relations with government and the donor community
- Develop better relations amongst themselves
- Improve management in NGOs
- Develop new ways of generating income.

The remaining days of the workshop focused on these

OUTCOME 3

Statements of agreement from the workshop:

- Maybe competition can help increase the quality of service that we provide.
- Competition should not be seen as an issue at all right now. There is so much demand we are overwhelmed. What we need is quality.
- Marketing should not be seen as a separate activity. It is an integral part of organisational effectiveness and assists organisations to focus on **products**.
- If we do not have **quality products** to market to our target groups, why do we exist? So we need to develop our own identity and create products that government and other stakeholders cannot refuse.
- Let us build alliances around specific products.

OUTCOME 4

Priority Action Steps

| TEACHER DEVELOPMENT | ABE | COMMUNITY DEVELOPMENT | EDUCARE |
|---|---|---|--|
| <ul style="list-style-type: none"> • Get commitment of leadership • Build interaction with business & marketing sectors for professional advice • Do market research • Identify position & role in sector • Assess costs of operations • Plan strategic plan with time frames • Strategic plan includes: objectives, goals, fund raising, marketing, relationships with external bodies, products & programmes, human resource re-orientation & development • Identify a market • Assess quality indicators (ongoing) • Resource relocation & distribution • Implement the strategic plan and form strong lobby groups with other organisations and approach government • Co-ordinate delivery • Evaluate the implementation of the plan | <ul style="list-style-type: none"> • Develop a marketing plan • Public campaign to raise ABET profile • Organise well publicised meeting with government and donors • Change the way we operate • Obtain marketing training • Cut out dead wood | <ul style="list-style-type: none"> • Build human resource capacity through providing skills and training • Conscientise our communities that they have potential • Build an integrated approach with other NGOs to service communities • Develop a financial strategy towards financial sustainability • Move away from crisis to strategic management • Refine our planning process • Build medium and long term strategies • Document our experience and indigenous knowledge | <ul style="list-style-type: none"> • Set up an initiating group • Secure funding for the implementation • Disseminate information about SAQA and the ECD sector • Develop a confident marketing strategy • Present market product to government • Meeting between representatives of SACECD, RTAs and the donor community and adopt a strategy • Adopt an advocacy role • RTAs adopt a role to mobilise existing resources from local, provincial and national government • Implement newly defined services • Ongoing evaluation • Identify a market week to funders |

Appendices

APPENDIX 1

Introductions

| Categories covered | Number Of Participants within specific categories | |
|--------------------------|---|-------------------------------|
| Province | W.Cape 8; E.Cape 5; N. Province 1; Gauteng 16; K /Natal 5; Free State 4 | |
| Sectors | ABE 6; Educare 15; Teacher development 1 Research/Policy 2; National Structures 4; Other 3 | |
| Major sources of funding | Overseas donors 30; Local business 6; Public funding Local Trusts and Foundations 4 | |
| Age | <u>Age group</u> | <u>Number of Participants</u> |
| | 20-25 | 3 |
| | 26-30 | 5 |
| | 31-35 | 8 |
| | 36-40 | 8 |
| | 41-45 | 9 |
| | 46-50 | 4 |
| | 51-55 | 2 |

APPENDIX 2

Expectations and Concerns

| As an NGO I am really angry that | If only other people could understand that our strengths are | We think that what we have to do is | So at this workshop we would hope to |
|---|---|---|--|
| <ul style="list-style-type: none"> • Donors are dropping us • NGOs are sidelined • Valuable capacity is lost • Misappropriation of funds affects our reputation • Govt/Funders make decisions slowly • No Govt. mechanisms to consult NGOs • Govt. is not ready to form partnerships & we are dependent on overseas funding We cannot market ourselves | <ul style="list-style-type: none"> • Ready made infra-structure • Managing crisis • We have expertise and 20 years experience • We have developed workable models • We are needs driven and have credibility with grassroots • We are a pressure group • Need to remain independent • We are coping and yet not as developed as business • Commitment • Ability to change and adapt • We are competing with consultants • Innovative and self-developed | <ul style="list-style-type: none"> • Explore alternative ways to generate income • Market our services • Lobby for funding during the transition period • Must remain apolitical • Lobby government for funding • Develop partnerships & joint representations with govt. • Network & avoid duplication • Become cost effective | <ul style="list-style-type: none"> • Build focused marketing strategies • Make joint statements to Provincial and National Govt. • Build funding partnerships • Identify where we lack skills and plan to acquire them • Build meaningful NGO/Donor partnerships • Expand networks • Explore possible mergers |

APPENDIX 3

Assessing the external environment

Form sectoral groups of no more than 8 and elect a facilitator and someone to take notes and report back.

Questions

- A
1. Where is the greatest need in your sector?
 2. How do our internal strengths match up with this/these needs?
 3. What are the logical steps of action that come out of this assessment?
 4. What funding/financing opportunities exist out there that could support these efforts?
- B
1. What are the greatest most serious blockages to our taking up these challenges/demands?
 2. What can we do to address these blockages?
 - Beyond our organisations (external)
 - Within our organisations

APPENDIX 4

Action steps proposed by sectoral groups (for their sectors)

| ABE | EDUCARE W. CAPE | EDUCARE E.C K/N | EDUCARE OTHER | TEACHER DEV. NAT/PROV. | COMMUNITY DEV. |
|--|--|---|--|---|---|
| <ul style="list-style-type: none"> • Public campaign • Raise ABET profile • Lobby govt/donors • Clarify your different audiences • Do market research and adjust products • Plan big • Change the way we operate • Cut out dead wood • Management & marketing training • Be cost effective | <ul style="list-style-type: none"> • External facilitation • Meet reps of SACECD, RTAs adopt strategy in A1 • Adoption by SACECD of advocacy role • RTAs adopt their role to mobilise resources • Implement newly defined service | <ul style="list-style-type: none"> • Change mindset • Initiate groups • Market week to funders • Develop market strategy • Present products to Govt/donors | <ul style="list-style-type: none"> • Develop plan: set time, e.g. 6 months; responsibility • Secure funding for implementation • Disseminate information • SAQA, ECD | <ul style="list-style-type: none"> • Identify key markets • Identify needs • Identify our role • Ensure quality • Partnerships/accreditation • Secure funding base • Rationalise materials • Develop business principles • Develop strategic plan & implement it • Cost operations • Manage change | <ul style="list-style-type: none"> • Build integrated approach • New \$ strategy • Document experience • Manage info. • Develop materials for external markets • Build HR capacity • Develop community potential |

APPENDIX 5

Elements of a good case statement

1. Its focus is on how the organisation responds to a recognisable human need
2. There is an emphasis on **results/outcomes** rather than **activities/inputs**
3. There is an absence of jargon
4. It addresses the **audience's priorities** rather than the organisation's needs. It attempts to show how a given organisation can respond effectively to needs or concerns of an intended audience.
5. There is a clear-cut description of the organisation's strengths, unique features and comparative advantages (particularly its relative **cost-effectiveness**).
6. There is a brief but explicit discussion of an organisation's **bona fides**: its history, governance, mission, philosophy, purpose and main areas of activity. Its **scope of operation**, e.g. annual operating budget and staff size are also presented.
7. Generalisations are supported by specific examples that show how the **human condition** has been improved through the organisation's activities.
8. Where appropriate **testimonials** should be presented.
9. The writing is clear, concise and of high human interest. Key points are highlighted in the text (e.g. through bullets, bold print or underlining).
10. Explicit areas of organisational competence (e.g. the kinds of needs or problems organisational resources can address) are stated explicitly.
11. Whenever possible, **unique or proprietary methodologies** should be identified and discussed

A sample case statement for critical analysis

The Roots Family Education Programme was founded in 1955 in Cape Town to address the problem of high levels of illiteracy among adults and children in nearby townships. Since that time, nearly 30 000 families have been offered a variety of services including literacy training, job counselling, parental skills workshops, and community development support.

Founded by members of the First Methodist Church's Social Action task Force, Roots today counts among its supporters many large corporations and international organisations including UNICEF and Save The Children. The philosophy of Roots is simple and straightforward: no family should be hindered from participating fully in society because of illiteracy.

Roots has pioneered a special approach to literacy called *Each one Teach One*, in which community-based tutors are trained in adult literacy work. Using simple pamphlets on topics of interest to adult learners, tutors work with adults in small groups to introduce basic reading, writing and numeracy skills. Over 90% of Roots participants improve their family income within a year of their enrolment in the programme. Even more importantly, evaluations show that the majority of families are able to see children through to high school completion.

Roots is now prepared to work with local companies, multinational enterprises and government seeking to offer lasting solutions to the problems impoverished people face. We invite you to contribute to our work through support for our community programmes, sponsorship of our published materials, or through a unique scholarship programme that we plan to launch in the near future.

As UNICEF Executive Director James Grant noted upon his visit to South Africa last year, 'The world would be a better place if there were more organisations operating with the effectiveness and efficiency of Roots'. We invite you to be one of our partners in this important work.

TASK ONE:

Within your group, analyse the Roots Case Statement. What are its strengths? What are its weaknesses? Suggest specific improvements that can be made to the case statement.

TASK TWO:

Using the guidelines offered in this handout, develop the elements that you would include in a case statement for your organisation, sector grouping, or on behalf of the South African Education NGO community as a whole. PLEASE NOTE: You needn't write a full case statement for this exercise. Rather focus your attention on the elements you would include in such a statement.

APPENDIX 6

Building a platform, creating alliances

1. To whom is the platform addressed?
2. What are the actions or outcomes that we are pursuing? State these in explicit terms. [This is our platform, manifesto or a statement of our aspirations]
3. How do these actions or outcomes relate to our case statement?
4. What is the rationale for these actions or outcomes that will appeal to our audience?
5. What are the relevant cost implications?
6. What is the proposed time frames for these actions?
7. What obstacles need to be overcome for these actions or outcomes to be achieved?
8. What specific steps should be taken to overcome these obstacles?
9. Who are the partners that need to be brought together in an alliance on behalf of the platform you are creating?
10. How should they be approached?
11. What aspects of the platform might have to be modified in order to appeal to potential allies?
12. What kind of organising structure do you need to advance your platform?

TASK ONE:

Analyse the platform included in this handout. What are its strengths? What are its weaknesses? What suggestions do you have for how it can be improved?

TASK TWO:

Using the guidelines afford in this handout,

(a) develop the elements that you would include in a platform for your organisation, sector grouping, or on behalf of the South African Education NGO community as a whole.

(b) Suggest additional actions that you might take to support this platform (please refer to points 7-12 in the *Platform Guidelines*).

PLEASE NOTE: You needn't write a full platform for this exercise. Rather, focus your attention on the elements you would include in your platform and the issues raised by points 7 - 12.

Sample Platform: The League of Community Housing Associations

The League of Community Housing Association represents 25 community-based organisations working throughout South Africa to extend affordable, safe housing to the poorest segments of our society. We believe that all people, regardless of income, are entitled to shelter that enables them to maintain their health, dignity, productivity, and sense of well-being. Toward that end we work with community members, local business, and local governments to rehabilitate existing housing or erect new units as necessary. Community people an integral role in this work, supervising all aspects of construction, collecting fees, contributing resources and managing the new housing stock. In every community where we work, new locally owned construction enterprises are formed to create new housing and maintain it once it is constructed.

Last year, our collective organisations were able to offer new or improved housing stock for 250 000 families with incomes at or below the official poverty line. We believe that we could reach many more families if the following measures were adopted by the National Government:

- Provide tax incentives to construction companies that donate equipment for use in our low-cost housing programmes.
- Provide low-cost loans to families seeking to participate in our efforts so that they can become cash co-financers of the housing that will benefit them.
- Provide government set-aside for NGOs when tenders are extended for low-cost housing schemes.

It currently costs, on the average, R3000.00 for our member associations to provide adequate shelter for a family of six. This is, on the average, one-third of what it costs governments or private enterprise to accomplish the same goal. The reason for our cost advantage is the participation of the poor themselves in our housing programmes. Our grassroots orientation, community-based philosophy, and organisational structures are all geared toward galvanising community initiative to extend housing opportunities to the neediest members of society.

We believe that the revenues foregone by government through the provision of the tax incentives and loans we propose will be more than offset by the savings that will accrue to government as a result of reduced crime, and higher income taxes paid by the citizens whose lives are rehabilitated through their participation in our housing schemes. Furthermore, new tax revenues will be generated as the small-scale construction enterprises formed in each community where new housing is built begin to grow and expand their markets.

We welcome the opportunity to work with government and design the steps necessary to accomplish the reforms we propose. **Specifically, we argue the formation of a Low Cost Housing Task Force** to design the time table and specific tax code changes that can accomplish what we propose. This Task Force should consist of 12 members drawn in equal measures from government, our association, and private sector housing construction enterprises. Its mandate should extend for 18 months, and its charge should be the formulation of every specific recommendations to accomplish the proposals we have put forward.

APPENDIX 8

Summary of the Educare group's platform statement urging the USAID to postpone their new funding strategy.

Concerns:

- There is no national framework and NGOs are going ahead with reception year. The implications are the neglect of the 0-4 years.
- Government will not look at parent training
- USAID investment over the years will be lost
- Government does not have a ready infrastructure
- What is now happening to money allocated for implementation

Proposal:

- The funding process should be phased out by increasing the 80 million rands presently allocated to NGO's and decrease transit money to Government.
- This should be done to assist government set up infrastructure and as a part of the phase out process.
- The USAID should enter negotiations with government before changing the funding process.
- USAID recipients should be a part of the negotiations process.

APPENDIX 9

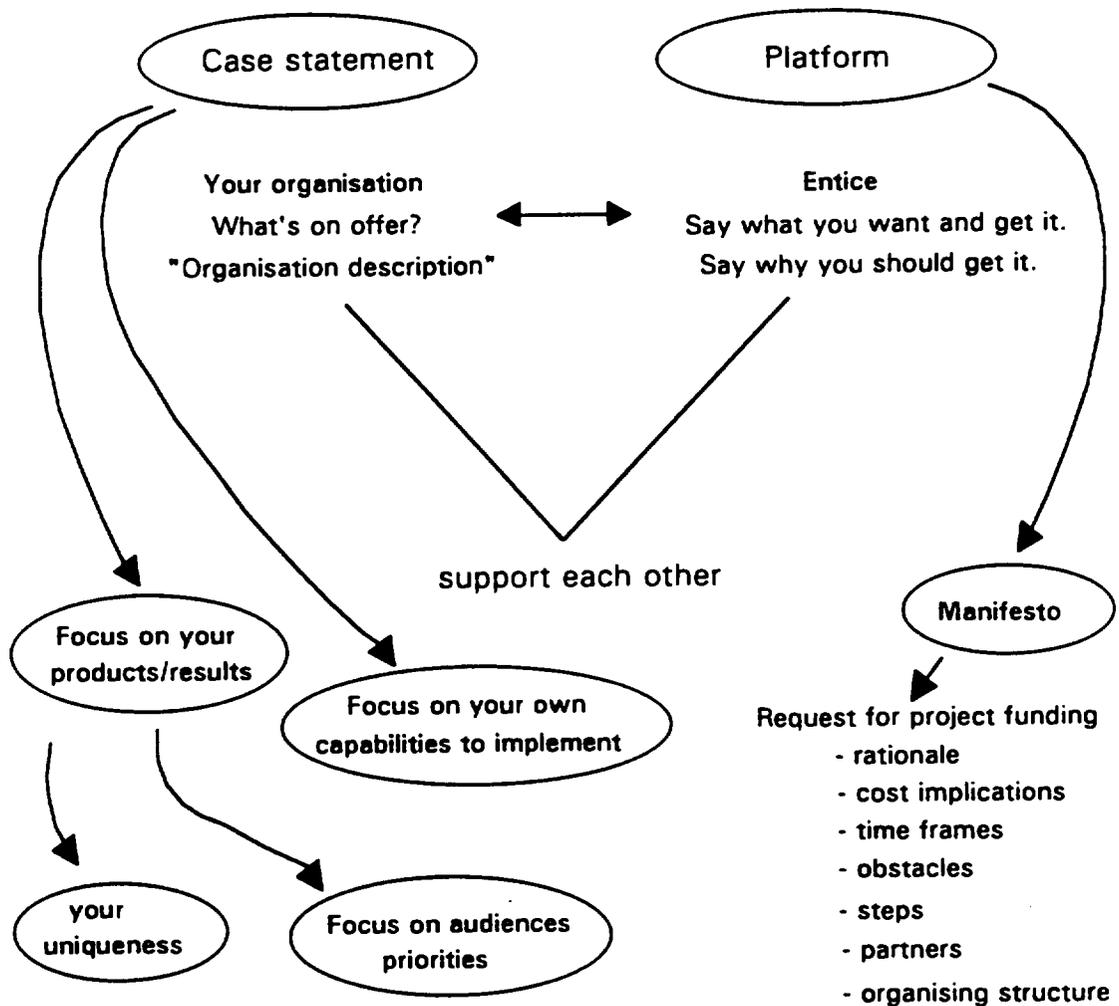
Why did we not use marketing concepts before ?

- Poor positioning
- No need to; funders came to us
- Low capacity, no skills and limited funding
- Dealing with overwhelming needs
- Crisis management
- Old battles and competitiveness
- Modesty
- Funding channelled to personalities not programmes

APPENDIX 10

Summary of day 3

Case statements and platform



APPENDIX 11

Guide for developing a comprehensive approach to marketing

What is the **external** context in which your marketing efforts will occur?

- Opportunities
- Threats

What is the **internal** context in which your marketing efforts will occur?

- Strengths
- Weaknesses

Who is the target audience?

- **Individual** characteristics (age, sex, income, education, language background) or **institutional** profile (mission, funding, mandate, resources, priorities, challenges)
- Locale(s) where the target audience can be found
- Other key characteristics

How can this target audience be segmented?

- Implications of this segmentation for marketing activities
- Priority segments for marketing activities

What are the primary needs of this target audience by market segment?

- What emerging trends may affect these needs?
- How are these needs currently being satisfied?
- What other options exist for responding to these needs?

What problems does your organisation face in meeting these needs?

- Internal (human, financial, material)
- External (who is the competition ?)
- Comparative strengths and weaknesses relative to the competition

What is your marketing strategy ?

- P1: The **programs, products and services** your organisation will offer to respond to these needs.
- P2: The approach you will take **price** your products or services (What will you charge ? Who will pay ? How much will they pay ?)
- P3: Where the products or services will be offered (**place**) and how they will be delivered
- P4: How the market will learn about the benefits of your products and services (**promotion**)

What are the specific steps that must be carried out to launch the product or services?

- Action
- Time frame for each action
- Time frame for bench mark indicators of each action
- Person(s) responsible
- Budget (if additional resources are needed, how will they be obtained?)
- Role of board

What steps do you have to take to create a **marketing orientation** within your organisation?

- Interdepartmental task forces
- Team-building exercises
- Organisational restructuring
- Staffing (transfers or new hires)
- Assistance from colleague organisations

What are your projections of costs and net revenues?

- First six months
- Year 1
- Year 2
- Year 3

What are the assumptions you make concerning these projections?

- Inflation
- Growth of demand
- Internal capacity

What indicators will be used to gauge the success of the marketing plan?

- Units produced and purchased
- Cost to produce a unit
- Revenue generated per unit
- Growth trends
- Product or service quality indicator
- Repeat business and other measures of customer satisfaction

What is the plan for gathering information pertinent to these indicators?

- Data sources
- Data collection techniques/instruments
- Frequency of data collection and review
- Participants
- Costs

How will the evaluation modify the marketing effort?

- Redefinition of target audience
- Changes in promotional strategies
- Suspension of current marketing plan
- Pricing changes
- Product redesign

APPENDIX 12

Cases For The Tendering And Costing Workshop

Case 1 - ABET

The Community Based Public Works Programme (CB PWP) has put to tender the design and the delivery of an ABET programme for 8 projects in the Gauteng and Northern Province for approximately 400 people. Time frames are as follows:

- Bids/Proposal:** 1st August 1995
- Decision:** 1st September 1995
- Start Work:** 15 September 1995
- Delivery:** Starts November 1995
Ends June
- Expectation:** All learners register and 70% complete IEB level 1 or 2 exams by July 1996

Specifications:

- (1) Urban projects are within a 40km radius from Bloemfontein
- (2) Rural projects are no further than 250 Km from Benoni
- (3) The English language is the medium for learning
- (4) Each project will accommodate approximately 50 learners

3 ABET organisation agree to tender jointly:

- (1) ABE Design in Pretoria agrees to get the programme materials ready by the 27th of October
- (2) Let's Read in Braamfontein agrees to deliver to the 4 Urban/Peri-Urban projects with 200 learners, starting in November 1995
- (3) Ahead in Benoni agrees to deliver to the 4 rural projects in the rural parts of the Northern Province. The project will start with 200 learners in November 1995

Exercise:

- Organise into 3 groups
- In your respective groups, identify clearly all your responsibilities
- Identify as precisely as possible all the resources you will need to complete your tasks

1
27

Case 2-- Educare

The Department of Welfare has put to tender the delivery of educare training for 24 people in 3 areas in the Free State. One of the areas is rural, 2 are informal settlements. Time frames are as follows:

| | |
|--------------------------|--|
| The bid/Proposal: | 1st August 1995 |
| Decision: | 1st September 1995 |
| Start work: | 15 September 1995 |
| Delivery begins: | 1st November 1995 |
| Delivery ends: | June 1996 |
| Expectations: | Teachers are trained and resourced to establish home based care facilities |

Specifications

- (1) Informal settlements no further than 40km from Bloemfontein central
- (2) Rural areas are 125 km away.
- (3) Training in English and Sotho
- (4) Materials cannot exceed R500 per learner

3 ECD organisations have agreed to tender jointly:

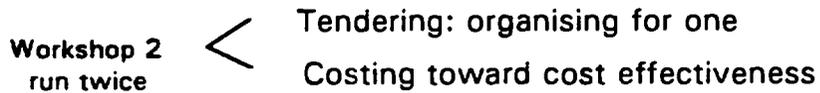
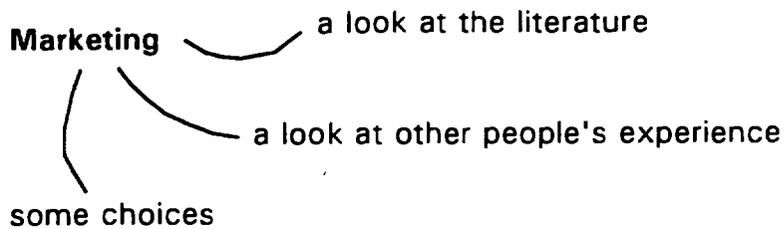
- (1) Let's Teach in Cape Town agrees to prepare all materials (resource and training) by 27 October.
- (2) Little Pumpkins in Bloemfontein agrees to deliver the training programme, starting in 7th November ending in Mid-May
- (3) Watchdog in Gauteng agrees to set up Monitoring and Evaluation systems and provide monthly reports and a final impact evaluation report by 6th June 1996

Exercise: (The same as in case 1)

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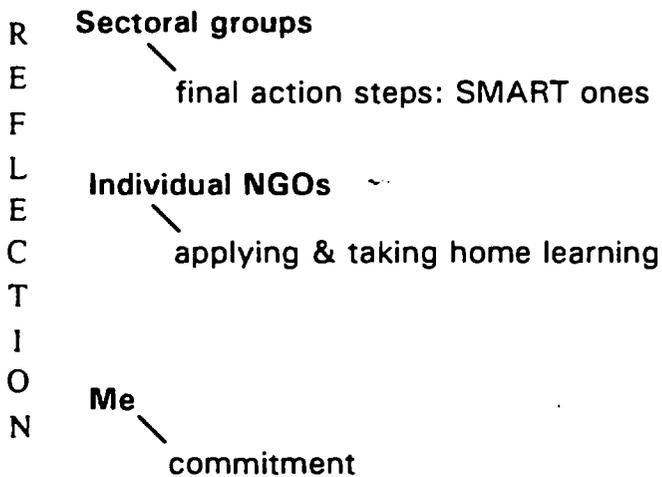
APPENDIX 13

Summary of Day 4 & 5



DAY 4

DAY 5



The way forward



APPENDIX 14

Participants were asked to reflect on these questions and write down their responses as a commitment for sharing their learning in their organisations.

Building Learning In My Organisation

- How will you report back?
- How will you share materials?
- How will you use any exercises/ tools you learned here?
- What will you lobby for in your organisations that should take place within the next 6 months?

What Are Your Commitments?

- What made sense for you?
- Identify 3 things you want to use in your work
- How will you do this?
- When?

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APPENDIX 15

Evaluation

| CONTENT | FACILITATION | WORKSHOP ORGANISATION | MESSAGES |
|--|---|---|---|
| What did you find useful that you will use? | What did you like about facilitation? | What was helpful? | Any messages to anyone? |
| <ul style="list-style-type: none"> • Inclusive costing for tendering • leadership and management • Step by step plan of action • NGOs have surplus not profits • Case Statements & platforms • The 4 Ps in marketing • Marketing strategies & how to implement plans • New information particularly 'coalitions' will change my behaviour • The way introductions were done • Costing, case statements & action steps potential for sustainability • Structured marketing ideas • Marketing strategies, writing of a case statement and cost effectiveness • Financial management helps to understand how to manage finances well • Need for marketing our organisations • Marketing plan • Building project teams | <ul style="list-style-type: none"> • Davine should have been involved more • Different exercises • Brought people on to different levels • Ideas and ideals, the monster was belittled • Driven by the needs of participants • Role plays • Action learning • The way activities were team facilitated • One introduces the other • Debriefing • Use of expert, Beryl during panel • Sectoral group exercise • Card exercises • Davine's methods • Open to alternative suggestions • Efficient and time conscious • Flexible and informal • Facilitation was flexible to needs • Use of groups & report backs • Work activities • Focused discussion • Guidance from facilitators • Small clarified issues • Humour and helpfulness of facilitators | <ul style="list-style-type: none"> • Different sectors • Use of ice breakers • Exercises • Able to contribute and participate • Sub-division into small sectoral groups • Working in groups particularly in costing exercises • Meeting people with similar difficulties yet different experiences • Meeting sectoral allies • Grouping into sectors • Focus on sectoral needs • Implementing a marketing plan • Transport plans • Excellent, library very good • Extremely friendly • Sectoral groups useful • Very professional | <ul style="list-style-type: none"> • Beryl and Davine were great but is it cost effective to bring a non-SA facilitator? SA skills exist • Begin to look into other sectors • Send us the notes before the workshop • Thanks • A big thanks to ABEL for facilitating • To Lando sorry for the bereavement thanks to your super organising • Julie keep us informed • Beryl & Davine well done • Thanks to organisers and facilitators & ECD group for constructive discussion • Thanks to ABEL & USAID • Thanks • To each other: lets devise strategies to cope with change collectively • To ABEL: continue to be proactive • Beryl, your expertise is phenomenal • Davine you are cool |

| CONTENT | FACILITATION | WORKSHOP ORGANISATION | ANY MESSAGES |
|---|--|-----------------------|--|
| What did you find useful that you will use? | What did you like about facilitation? | What was helpful | Any messages to anyone? |
| <ul style="list-style-type: none"> • Marketing is integral to marketing • Emphasis on performance indicators • Case statement revision • Organisation development • Costing workshop • Making room for other sectors • Costing your activities • Costing and strategic planning • realised how costing is done, clarified misunderstandings • Costing is fantastic • Case statement, costing & group work • Alternative ways of raising funds • Reorientation of NGOs in view of changing situations • Role play • Costing exercise and its impact • Performance evaluation • Tendering • Costing, elements of marketing • ECD group feedback • Action steps • Tendering and costing • Alternative funding sources • External case statement • Marketing strategies • Running an NGO like a business | <ul style="list-style-type: none"> • Seeing excellent skills in action was a learning experience in itself • Good introduction activity • Examples gave clarity • Group involvement and participation • Very professional • Interesting • Different methods used • Opportunity for participants input • The event was very useful • Professional and varied delivery • Balance between information and action • Friendly • Gave everyone chance to participate • Advisory and encouraging • Extremely positive about our future • Knowledge and experience • Flexibility • Opportunity for brainstorming • Diverse, very good • Well presented • Facilitators relate well with people • Note outlines from Beryl • Wealth of experience | | <ul style="list-style-type: none"> • Thank you for accommodating other sectors • Facilitators, you were resourceful • Thank you let us refine our workshop planning programme and impact to be cost effective • Thank you ABEL, Davine, Noki and Beryl • Well planned and facilitated workshop • Thank you to all for input • A big thank you to ABEL Beryl and Davine • Lets all take courage • Try to give clear direction to venue |

| CONTENT | FACILITATION | WORKSHOP ORGANISATION | MESSAGES |
|--|---|--|--|
| What was not very useful ? | What was not so helpful ? | What could be improved ? | Any messages to anyone ? |
| <ul style="list-style-type: none"> • SWOT • Case statements, tendering & cost effectiveness • Management discussion in an very big group • Some of the information was done too many times • Too much to use at once at plenary • Case statement • Underestimation of level & experience of participants • Excess of marketing • Incomplete exercise which one could have learned a lot from • Content repetitive but useful • Working as sectors • Some academic input • Too much rhetoric and not enough of reality • Not enough input & background material | <ul style="list-style-type: none"> • Always in the same sectoral groups • Repetition of same concepts e.g marketing • Too relaxed an approach • No contact with facilitators in smaller groups to check that all is well • Discipline lacked re: starting times • Too much time for 'getting to know you' • Marketing discussion passive • need more time for the workshop on costing and tendering | <ul style="list-style-type: none"> • Venue too big, acoustic bad • Time keeping, avoid rushing • Certain topics needed more time • Give reading material beforehand • Need daily summaries on paper • Write tasks clearly • Too many things but short time • Air conditioning was noisy • Too much time spent on case study • More advanced preparation • We needed more activities rather than sitting and listening | <ul style="list-style-type: none"> • Have more workshops continue this process • Facilitators: I wish you could transfer those skills to many more • ABEL: the timing is right for the transition, continue training us • Glad I came, thank you Julie, Beryl, Davine and all • Thank the group for the support & information shared e.g. funding |

| CONTENT | FACILITATION | WORKSHOP ORGANISATION | MESSAGES |
|--|---|--|-------------------------|
| What was not very useful about content? | What was not so helpful about facilitation? | What could be improved? | Any messages to anyone? |
| <ul style="list-style-type: none"> • Little if not none • Some information on marketing was already known • Nothing • needed more time for costing • What was not useful • Can't think of one • Too slow due to repetition • Platforms similar to things we've done • Initial facilitation good, bogged down with case, marketing, picked up with costing • Repetition, therefore great time wastage & dropping of interest • Excessive marketing • Group work on unreal case studies • Plenary discussion • I did not meet my expectations re: alternate funding strategies • Suspect lack of adequate preparation re: alternate funding strategies • Did not unpack what is alternate finance strategy | <ul style="list-style-type: none"> • Need more direct input, examples and stories • Too much time on expectations • In crisis times we need more hard facts interventions • Too many ideas different at short time • To improve Beryl's voice, she minces words • Anxiety that most needed topics would be overlooked • Could have done with more time • Being tired • If we consolidated elements & moved on to financing strategy more | <ul style="list-style-type: none"> • Fewer topics within time allocated • Need to improve transport arrangements • Too much time spent on generalities. More defined tasks in small groups would have been more useful • Workshop venue could be more friendly • Focus on one specific idea from start to finish • Delivery of a few topics was fast | |

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