

Tutorial letter 501/3/2015

**Project Management and Evaluation
in ABET**

ABT3626

Semester 1 & 2

Department for Adult Basic Education

IMPORTANT INFORMATION:

This tutorial letter contains important information about your module.

BAR CODE

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Introduction

Welcome to **Project Management and Evaluation in ABET**, one of the modules in the Diploma in Adult Basic Education and Training.

The module is at level 6 of the National Qualifications Framework (NQF) and is meant to examine some of the contextual factors that have to be taken into account in the management and evaluation of projects.

At this level you already know quite a lot about ABET. You have already been introduced to the social context of adult learners and the role of ABET in communities. By now, you should also know a lot about how adults learn and what we can do to motivate them to learn. Why, then, do you need to learn about managing projects? If you take a quick glance through this guide you will see that we deal with a range of issues that you will need to know about if you work as an ABET practitioner. In this module we try to answer questions such as:

- How will I know what kind of projects are needed in a community or in an organisation that I will be working in?
- Once I know what projects are needed, how should I go about planning them so that they can start at a specific time, and how can I keep them running?
- Who should be involved in planning the project?
- How should the project be managed so that it runs smoothly and successfully?
- What do I need to know about administering a project?

However, we know that ABET practitioners work in a variety of contexts, and so we do not pretend to offer you recipe-type answers to the questions we have just listed.

Aims of the module

The aim of this module is to give you a broad overview of how to plan and manage projects – we hope that you will be able to adapt these ideas to your own situation. We will be happy if, through this module, we have helped you gain further knowledge, skills, and applied competence that will enable you to plan, implement and manage projects in the field of literacy and ABET.

Learning outcomes

The statement of learning outcomes given below tells you what **results** are expected from your study of this module. These outcomes tell you what content you are expected to know as well as what you should be able to do or demonstrate. Of course, these learning outcomes rest on the assumption that you will read and study this study guide, complete the recommended study activities, and complete all the assignments.

By the end of the module you should be able to:

- 1 demonstrate an understanding of what project management is and its role in addressing community development problems
- 2 initiate community development projects
- 3 implement community projects following accepted community management guidelines
- 4 involve communities in local project

The units making up this module

This module consists of the following topic areas, covered in six study units:

Unit	Title	Topics covered
1.	What to do before starting a project	How to find out what needs a community may have and whether there are special learning needs in a community or organisation
2.	Planning an ABET project	How to arrange things so that a project can be started on a particular day; how to get community members involved in planning the project; how to write up the plan for the project
3.	Managing an ABET project	What a good manager should be like and how to incorporate the ubuntu philosophy into the running of an organisation; how to coordinate staff tasks; how to resolve conflict between staff members; how to write a project report
4.	The organised ABET practitioner	How to keep records in order; how to file documents; how to write minutes of meetings; how to manage money; some of the other skills needed in administering a project
5.	Evaluating an ABET project	This unit discusses ways of checking to see if a project is doing well or not. You will find unit useful to help you evaluate whether a project is doing what it set out to do.

Units

The study guide for this module is divided into six **units**. Unit one is introducing you to basic project management and unit2 to six, each covers topics related to the learning outcomes.

Unit aim

This is a **general** statement of what you will learn in a particular unit and of what material has been supplied to help you to do this.

Learning outcomes

These are **specific** statements of what you will be able to do once you have worked through a particular unit and completed the activities related to the unit.

Unit content

This is the material you will study and think about. In units 2, 3 and 4 you will notice that there is an asterisk (*) after some words, terms or phrases. This tells you that the word, term or phrase is explained in the glossary at the end of that unit. A glossary is an alphabetical list of words, terms or phrases and an explanation of what they mean.

ACTIVITIES

Included in the study material are a number of activities. These tasks have been designed to help you assess your own understanding of the material. The activities include questions, exercises, self-tests and ideas to think and write about.

HOW MUCH TIME TO SPEND ON EACH UNIT

This module is rated at 12 credits. This means that you should devote about 120 hours to studying this module. You must therefore plan to spend time:

- reading the materials
- completing activities as you work through the materials and attending tutorials
- writing assignments, and preparing for and writing the examination

We recommend that you divide up your time as follows:

- Reading through this introduction and the four units (40 hours – about 10 hours per unit)
- Completing activities and attending tutorials (40 hours)
- Writing assignments (this includes preparation, reading, writing and careful editing) (20 hours)
- Preparing for and writing the examination (20 hours).

SOURCES OF ADDITIONAL INFORMATION

Most of the basic information you need for this module is either presented in this study guide or during the tutorial sessions, or available in the tutorial letter you received with the study guide. But what about other information not in these sources?

FURTHER READING

Some information can be obtained from recommended books or journal articles. You can borrow these from the university library.

THE INTERNET

Another primary source of information is the internet, or World Wide Web. Computer facilities are available at the university to enable you to access this online resource.

THE OTHER LEARNERS STUDYING THIS MODULE

Studying by yourself can be a lonely task. A rich source of support, information and experience is your fellow learners (you could interact informally, set up a study group, or join a Unisa tutorial group).

SUPPORT FROM THE MODULE COORDINATOR

We recommend that you make use of the support given by the module coordinator. You are welcome to make appointments to see the coordinator, and you can also communicate with him or her by letter, telephone, fax or e-mail (contact details are given in the tutorial letter).

ASSESSMENT

Assessment in this module takes the form of **assignments** and the **examination**.

Assignments

You will be asked to complete **two assignments** during the course of this module. There is a due date for each written assignment, and the assignment must reach Unisa **on or before** that date.

Completion of the **first assignment** is a requirement for admission to final examination. **If you do not submit Assignment 01, you will not be allowed to write the examination.**

The examination

This will be written at one of the recognised Unisa examination centres. The duration of the examination is two hours.

UNIT 1: WHAT TO DO BEFORE STARTING A PROJECT

1.1. WHY ARE PROJECTS NECESSARY?

In this unit we will be looking at ways of finding out what the need of communities are. We will be discussing the skills we need to **plan** and **start** a project and we will attempt to answer questions such as the ones below.

KEY QUESTIONS

- 1 How will I know what kind of project to start in my community?
- 2 What do I need to know about my community before starting a project?
- 3 What ways are there for finding out more about my community?
- 4 If communities have many needs, how can they **prioritise** their needs in order to choose a project?
- 5 What kinds of questions could I ask to find out whether there is need for ABET in my community?
- 6 How can I find out whether there are any special learning needs?

Let's start off by imagining that you have just arrived in a certain town. You have never been to this town before, and you feel very strange and lost. But because you plan to stay there, you will need to find out what possibilities there are in the town for finding work. You will also need to find out whether there are any schools, and if so, where they are, and which is the best one to send your children to. You will need to know where the shops are, so that you can buy food. And you may want to know who the leaders are in the town. How will you get the information that you need?



ACTIVITY 1

- *Will you ask the first person that you see to give you this information?*
- *Will you ask the driver of your taxi?*
- *Will you look for a post office or police station and ask someone there?*
- *Will you try to find a local newspaper and read about the town?*
- *Will you find a shebeen or pub, pop in and ask the people there?*
- *Will you just walk around for a while looking, listening and thinking about the things you see, and hoping that you will find some of the necessary information in that way?*

Of course, many of you would have said that you would have found out everything you needed to know before you moved to the town. However, for the purposes of this activity, let us imagine that for various reasons you were not able to do any fact-finding in advance: we are therefore interested in how you would have found the information you needed once you arrived.

We would have tried some or even all of the ways mentioned above. Could you perhaps have added to the list we gave of ways to find out information about a town? Most people would start off by speaking to various people in the town, reading the local newspapers, asking the local leaders or even by walking about and observing town life. Most of us have done similar things when we were lost and we needed directions to find our way.

If you have ever done anything like this, then you have already done some low-level community research.

Now let's imagine that you live in a village where there is a very poor system of education. You have been chosen by your community to help to improve the system of education in your village. How would you go about this task? You would have to do some community research and look more closely at what the problems in education are before you could decide what to do, and you would need a good understanding of what the problem is and how the community functions before you do anything. How will you do this?

To answer this question, we will let Grace Molopa, a rural education facilitator who managed to solve a similar educational problem in her community, tell you her story. In the following case study, she will tell you about her project in the Muldersdrift area, just outside Johannesburg.

Case study: Grace Molopa's pre-school project

I was very interested in helping communities. So – after getting married, my husband and I moved to the rural area of Elandsdrift in Muldersdrift. I started to work for the local civic association. It was a very exciting job. After about a year, the civic association sent me on a training course. I learnt important community development skills. The training was difficult, but I enjoyed it very much.

For one of my assignments, I had to go into a few communities and do some research. I had to try to find out what the needs in these communities were. I used many different ways to find out what their needs were. I talked to many people in the community. I spoke to parents and I found

that in all three communities, parents were very worried about the safety of their children. Some parents worried because they had no one to leave the children with when they went to work. Others worried because they had to leave small children with older children. And some parents worried that their little children would get cold when they were left in the shacks all day. I also spoke to some teachers at a local school and found out that there was a very high failure rate in the primary schools.

I then thought that there was a big need for pre-schools and crèches where the children could be safe, and warm in the winter months. If the children had some pre-school education, the number of failures in the primary school would not be so high. I mentioned this idea to our chairperson at the civic association and she was keen for us to start with a pre-school project in the three communities. But it was difficult to decide which community to begin with – you know – I found this to be a need in all three communities I did research in.

Eventually I decided to start in Zandspruit because the problems there were very bad. The people in the Zandspruit community used to live on plots and farms around the Randburg area. In 1993 they were evicted and they had to move to Zandspruit. This caused many problems because of the lack of facilities in Zandspruit. Many of the children had to attend school and pre-school in different areas and they had to travel long distances every day. I found out that the community had many other problems which were difficult to solve. The farmers harassed the people. When my colleagues in the civic association tried to help, we were threatened by right-wingers. Once we were even arrested in the Diepsloot area and charged with trespassing.

Also, the weather was very bad. We had heavy rains. Some of the people's belongings got damaged in the rain. The police showed no respect for the people's property and also caused a lot of damage to people's property.

Because Zandspruit seemed to be in need of pre-schools more than the other two communities, my first project was in Zandspruit, where I started the Realeboga Pre-school.

I began by speaking to the community. Then I formed a committee and we started planning what we had to do to start the pre-school. First, we had to find a place to start it. I discussed this with the community and they suggested that we use an old house that belonged to the Randburg Town Council. So, next I asked the Council if they would allow us to use the house. Then I asked the community to find out if there were any women who were prepared to work with children. Only four mothers were. The four women were trained to work with children. After they completed their introductory training course, we started the pre-school. In the meantime, I did fund-raising and I also got donations of equipment and toys and lots of other useful things from various organisations.

The Realeboga Pre-school opened in October 2011. The school is run by the committee and teachers. The fee is R15 per month. We use the money to buy food for the children and what is over is shared equally among the teachers.

We also started another pre-school, the Kwena Molapo Nursery School, which is running at Kwena Molapo High School in the Lanseria area. It has 58 pupils and is also run by teachers and the committee. When the schools are opened, the committee and the teachers take over the running and I move on to do something else.

We stand with Grace and we listen to a group of happy pre-school children singing. And Grace tells us, "Both schools are running well. I wonder where I will start with the next one?"



ACTIVITY 2

Read Grace's story carefully and then write down brief answers to the following questions:

- 1 *In what way did Grace's research in the three communities help her?*
- 2 *Why did Grace choose a project involving pre-schools?*
- 3 *Why did Grace choose to start a pre-school in Zandspruit first?*
- 4 *List the steps Grace and the committee took in order to open the pre-school.*
- 5 *Did Grace involve the community in her work? Why do you think she did this?*
- 6 *Why do you think Grace is no longer involved in the pre-school? Do you think this is a problem?*

There are no right or wrong answers to most of these questions, because each of you will probably have responded on the basis of your own experience in your community. We have, however, supplied some possible answers that you can compare with yours.

- 1 Grace's research helped her to understand the needs of the communities. It also helped her to see what kind of project would be useful to the community. On the basis of her research she decided that a pre-school project would be of the most value in the community.
- 2 While Grace was doing her research in these areas she found that many children under the age of six were being left unattended while their parents were either at work, or doing their daily tasks. In some cases older children had to stay away from school to look after the little ones. While Grace was doing research in the community she noticed that there was a high failure rate at the local primary schools. She thought that this situation might be improved if children had some early learning experiences before they began attending school. For all these reasons she saw pre-schools as a priority, and so she chose to start a pre-school project.
- 3 She chose to start a pre-school in Zandspruit first because this area had the most problems. The community had recently moved there and they had access to very few services.
- 4 First, they needed to find a venue: this had to be a place accessible to the mothers, as they had no transport to get their children to school. Second, Grace and the committee found an unused house nearby. Third, they asked the Randburg Town Council for permission to use this property as a pre-school for the community. Fourth, Grace had to find teachers who were willing to look after the children. Once she had found the four women who were willing to do this, they had to receive training. Fifth, she managed to get equipment and toys donated to the pre-school.
- 5 Yes, Grace consulted the community on many issues, and her committee was elected from and by the community. Also, the teachers came from the community. This was important because it provided employment for members of the community. An added advantage was that because the teachers came from the community, they lived very close to the school and did not have to be compensated for the cost of transport.
- 6 Grace moved on to start other pre-schools in other areas where they were needed. We do not think that it was a problem that Grace moved on to other projects. Grace is a facilitator, not a pre-school teacher, and so her skills were directed towards starting other projects,

leaving the community and the school committee to run the school. Grace still visits the pre-school from time to time, to see how things are going.

1.2. WHAT YOU NEED TO KNOW ABOUT THE COMMUNITY BEFORE STARTING A PROJECT?

The case study showed that it was important for Grace to have a good understanding of her community. Even though Grace lived in the community and already had some understanding of the area and its problems, she still had to do some research to find out:

- *What were the needs of the community?*

She found out that they had many needs relating to aspects such as housing and transport.

- *What resources were available in the community?*

Grace had to find out what buildings were available for a school and who could assist with teaching the children.

- *What was the biggest problem in the community?*

The community had many problems. After speaking to a number of people, Grace found that the lack of pre-schools and the fact that children under six years of age were being left unattended was the biggest problem.

- *What kind of project would solve the problem?*

We know that Grace decided that a pre-school would solve the problem.

- *Would the community support the project?*

Grace needed to find out whether the community thought pre-schools were a good idea.

So you can see that it is important to make sure that you understand the community well enough to be able to answer questions of this kind before you start a project. And to get the information, you need to do some research.

1.3. What research is

Look back at activity 1, where we spoke about the kind of research we do when we need to find out directions or when we need information about a particular place. We could say that **research is studying something in order to discover new information or to come to a new understanding**. We all do research in some form or another all the time.

In the case study we saw that Grace had to do a lot of research in order to find out what the problems in the Zandspruit community were. She told us that she had to speak to people and try to get information so that she could understand their problems better.

In the next section we will look more closely at the kind of research that Grace did to find out about the education and development needs in Zandspruit.

1.4. Problem solving for community development

We saw that Grace started her research because she wanted to understand more about education in rural communities so that she could start a project to help solve the problems in these communities. She started off her research by **speaking** to people in the community and by asking them questions. She needed to understand the community better in order to try to help solve community problems. After holding many discussions she was able to identify the biggest problem in the community.



ACTIVITY 3

*Read through the case study again and then draw a diagram to illustrate all the problems that Grace identified in the Zandspruit community. Write **PROBLEMS AT ZANDSPRUIT** in the centre of your diagram. Don't look at our diagram until you have completed your own.*

We thought that it would be best to divide the community's problems into two groups like this:

PROBLEMS AT ZANDSPRUIT

Problems involving children

- parents away at work
- no safety
- children cold
- schools far away
- babies left with other children
- high failure rate in primary schools

Problems related to living conditions

- evictions
- harassed by farmers
- bad weather
- rain damages property
- damage to property by police

Your diagram may look very different from ours – that is absolutely fine, as long as it presents more or less the same information as ours does.

In the case study, Grace says she found many different problems in the community. We have indicated all of these in our diagram. But you can see that Grace focused more on the need for a pre-school in the area. She was able to **narrow down** her investigation by focusing on problems involving children under six years of age.

We have tried to show this in our diagram. We therefore identified all the problems related to living conditions that people in the area were experiencing, and we created **a separate group for the problems involving children**.



ACTIVITY 4

Look at our diagram above. Grace found that the parents in the community were very worried about their young children. Try to think about the kinds of **questions** that Grace might have asked the parents in the community about this.

We think that she would have asked questions such as

- Do you have children?
- How old are they?
- Do you work?
- Where do you work?
- How much time do you spend away from home each day?
- What happens to your child/children when you go to work?
- Are you satisfied with this arrangement, or are you worried about your child/children?
- You say that your children don't go to pre-school – why is that?
- What kind of childcare arrangements would be best for your child?
- If we started a pre-school in Zandspruit, where should it be?

These kinds of questions could have helped Grace to explore the problem of the lack of pre-schools.

When doing this kind of research, you have to make sure that the questions you ask deal with the problem you are investigating. It is a good idea to write down what you think the problem is. Try to be as specific as possible. When doing her research, Grace wrote:

I think that there is a problem of junior primary children failing at school. I need to find out about pre-schools and primary schools in my village.

By writing down the problem, Grace was able to narrow down her investigation. She did not focus on problems with the police or the weather or on the lack of transport or the poor housing conditions. She knew that it was not possible to research all aspects of a community. So although Zandspruit has many problems, Grace was able to narrow down her investigation to looking at the *educational problems of pre-school children*. How did Grace do her research?

1.5. Planning research

Grace had to plan her research. To do that, Grace had to ask herself these questions:

- Who am I going to approach to get the information I need?
- What issues am I going to focus on?
- What questions am I going to ask?
- Where am I going to find the information?
- When am I going to do this?
- How am I going to collect my information?

1.6. COLLECTING INFORMATION ABOUT A COMMUNITY

There are many ways to collect information about your community that will help you to understand the community better and develop certain parts of it. Depending on what kind of

project you will be engaged in, you will have to decide which methods will be suitable and useful for you.

We have included some that we think you might find useful. However, there may be other ways of collecting information that are more useful and practical in your community.

1.6.1 Choosing the right person to speak to get the information you need

You will have to think about who you will speak to. This may depend on what you are researching. Try doing the activity below.



ACTIVITY 5

If you need information about each of the following aspects, who would you ask?

- which is the best football team in the area?
- where to buy drugs?
- how to join the church choir?
- how to steal a car?
- where to get a driver's licence?
- who is the oldest person in the community?

You would not ask a police official to help you with all of the above information. Nor, for that matter, could you ask a priest to help with all the above information. If you were asking about how to steal a car or where to buy drugs, you would seek out a very *specific group* of people to avoid being locked up in jail! So you can see that it is important to think carefully about who would be the best possible sources of information.

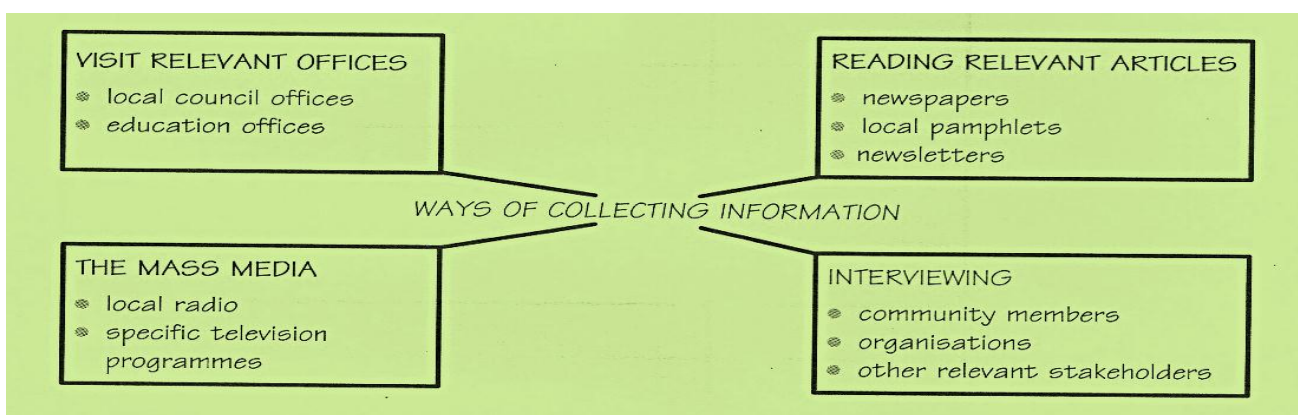
Choosing the right people to speak to (or to interview) is only one way of collecting information. There are a number of other ways. Let's look at some of them.

1.6.2. Other ways of collecting information



ACTIVITY 6

There are many different ways of collecting information about our communities. How many can you think of? Draw a diagram to illustrate your ideas. Write **WAYS OF COLLECTING INFORMATION** at the centre of your diagram.



1.6.3 WAYS OF COLLECTING INFORMATION

VISIT RELEVANT OFFICES

- local council offices
- education offices

Read relevant sources of information

- newspapers
- local pamphlets
- newsletters

FOLLOW THE MASS MEDIA

- local radio
- specific television programmes

CONDUCT INTERVIEWS

- community members
- organisations
- other relevant stakeholders

Now let's look at these methods in more detail

Visiting relevant offices, committees and organisations



ACTIVITY 7

Think about or discuss with your study group what kinds of information you could obtain from each of the following sources:

VILLAGE LEVEL	WHAT INFORMATION COULD THEY GIVE ME?
tribal authorities	
civic association	
youth group	
women's group	
school committee	
Clinics	
NGOs	
DISTRICT LEVEL	WHAT INFORMATION COULD THEY GIVE ME?
local government offices	
civic offices	
magistrate's offices	
education offices	
libraries	
NGOs	

Each of the above will be able to give you some kind of information that might be useful to you in helping your community and in understanding its needs and its resources better.

Reading relevant sources of information

When doing research, you will find that newspapers and local newsletters can be useful sources of information. If you are doing research into the needs of a particular community, you will find it useful to collect articles from newspapers and any local newsletters that deal with issues in the community. These not only give useful information, but also help you to understand and interpret other information that you may have. If you are doing research in a specific area, you may find many useful articles about topics such as the education policy, housing policy, or policy on tribal authorities and local government. This information is important, as it can guide you on ways in which problems in your community can be solved. Here is an example of an article that we found in the *Sunday Times* of 9 July 1995. Even though this article is not about your own community, we think that articles like this could provide important background information about women from the rural areas who work in town.



ACTIVITY 8

Read the newspaper article below.

Now make notes on

1. *Christina's personal problems*
2. *The problems that Christina's dependants have*
3. *The kinds of problems that Christina might have if she wanted to attend an ABET class*
4. *The kinds of things you could learn from an article like this (Think about whether understanding these things will help you to understand other rural communities better.)*

Here are our answers.

- 1 Christina earns very little money. Her transport costs are high. She spends very little time at home and with her family and gets very little sleep. She has to support many people on the small salary she earns. There is no electricity in her home, and the community where she lives is unsafe.
- 2 There is not enough money to send the children to school or to buy books, uniforms and so on. Some of the older the children have to stay home to look after the younger children because their mother and grandmother are away. They also have to fetch water and wood, which means they have little time available to attend school or, if they do attend school, they are likely to be tired when they get there. Because their parents and grandmother are away from home they do not have any adult supervision. They also do not have enough **educational stimulation**.
- 3 We do not think that it is possible for Christina to attend adult education classes, because she does not have the time or the money to do so. She leaves home very early in the morning and gets home long after most classes have ended.
- 4 Christina's community might be very similar to other rural communities. The similarities might be:
 - There is no work in the area, and so people have to travel long distances to work.
 - Transport costs are high.
 - One salary supports many people.

- Many people live in one household.

You can see that newspaper articles can provide a valuable source of background information on community problems.

Following the mass media: local radio and television programmes as a source of information

In the same way that newspaper articles and newsletters can be helpful, radio and television programmes that relate to your community and its problems can also provide you with useful information. Have a look in local newspapers to see whether there are any programmes that are relevant to you. If you do not have a television you can perhaps find out whether someone in your area has one, and ask whether you can watch relevant programmes.



ACTIVITY 9

Find a TV guide. Although we do not always know what certain programmes will be about, look carefully at the titles of programmes and think about, or discuss with your study group, which programmes you think would be useful in helping you to understand more about community development. Talk about what you think the programmes could be about and discuss why you think that they could be useful.

1.6.4. Holding interviews with community members, organisations and other relevant stakeholders

Speaking to (or interviewing) community members are usually one of the most useful ways of collecting information about a community, a rural community in particular. This is because rural communities are usually more **close-knit** than urban communities and people tend to know a lot about one another. Interviewing the members of your community is also useful because it gives you the opportunity to network better.

Networking is one way of meeting people (such as the traditional leaders) who can give you permission to run projects. Networking will also enable you to make contact with people who could support and help with the project. Interviewing therefore helps you to collect lots of information about the community, and also helps you to make contact with people who can assist with the project.

1.6.4.1. What interviewing is

In the case study about the pre-school project in section 1, Grace interviewed the parents in her community. In section 2.2 we thought about the kinds of questions that she would have asked the parents. Interviewing is an **organised** way of asking people questions. The person asking the questions is called the **interviewer** and the person answering the questions is called the **interviewee**. We have all heard an interview on the radio, or seen one on television.

1.6.4.2. Thinking about questions for an interview

Look back at the questions that we thought about in section 2.2. You will notice that the questions were asked to find out something specific.



ACTIVITY 10

The following list of questions is intended to help you find out by means of interviews whether or not the people in your community see a need for ABET classes. Think about, or discuss with your study group, which questions are **not** relevant. Give reasons for your answers.

- 1 Where do you live?
- 2 Where do you work?
- 3 What standard did you complete at school?
- 4 What is your favourite football team?
- 5 What time do you finish work?
- 6 Do you attend classes at work?
- 7 Would you like to have another child?
- 8 When did you last go to church?
- 9 Why would you like to attend school?
- 10 Why did you not matriculate?

We think that questions 4, 7, 8 and 10 are not relevant. All the other questions could give some information about **why**, **where** or **when** the classes should be held.

When you are formulating questions, it is important to try them out on one or two people before you conduct your actual interviews. This will show you whether people understand the questions, and whether they give you the kind of information that you will find useful. If they do not, you may have to make the questions clearer, or ask different ones. When you try your questions out before the interviews you may discover that people will be offended by some questions, and so you need to decide what to do in those cases.



ACTIVITY 11

Listen to the first section on the cassette. On this section of the tape we hear an interview between Nelson and Thembisa. Nelson is trying to find out whether Thembisa would attend ABET classes in the community. The interview does not go all that well.

- 1 Listen carefully to the interview and think about how Nelson probably felt while doing this interview.
- 2 Listen to the tape again and think about how Thembisa probably felt while she was interviewed.
- 3 Write down two the names NELSON and THEMBISA as headings, and under each heading write down what you think the person felt during the interview.
- 4 Listen to the tape again. This time, write down some of the good points of Nelson's interview.

Remember to stop the tape when you need to write.

Below, Nelson and Thembisa tell us about how they felt during the interview. How do your answers compare with what they say?

Nelson's experience

- At first I wanted to postpone the interview, because I could see that my interviewee was very busy, but then I decided to try and get her to be interested by telling her what the interview was about. Once she was interested, she cooperated more.
- In the beginning I felt I was irritating her, and this made me feel bad and lose confidence.
- It was difficult to explain in a simple way why I wanted information from her.
- I think that I asked the questions too abruptly. I think an interview should flow almost like a conversation. If you ask the questions too **abruptly**, the situation becomes **intimidating** for the person that you are interviewing. Like when I asked her about the highest standard she had passed. I could have phrased the question better. Or I could maybe have asked it later on.
- I found it difficult to write everything down. I should have used a form that I had prepared beforehand, and that I could have just filled in. I was not prepared enough. I was writing everything in such a hurry that I can't even read it now.
- I was nervous. The question of fear can be important. It has to do with confidence. You have to be very confident to actually go from door to door and talk to people about their lives.

Thembisa's experience

- I was starting to get irritated because Nelson was taking up my time.
- I also felt some of the questions were quite personal, and was not sure that I trusted him enough to give him the information he wanted.
- I also did not want him to know my age. I was suspicious about why he needed to know how old I am.

Good points of Nelson's interview

We think that Nelson did the following things well:

- He explained the reason for his visit. He said that Thembisa could continue with the washing and he would ask the questions while she worked.
- Nelson told her that he would keep what she had told him confidential.
- Nelson thanked her for her time.

To help you avoid some of the stress Nelson experienced, we have included a checklist for interviewers for you. Read through it after every interview you do, and make a tick in the "Yes" column if your answer to the question is yes, and make a cross in the "No" column if your answer to the question is no.

If you marked the "No" column, think about the question and what you could do differently next time to improve your interviewing technique.

CHECKLIST FOR INTERVIEWERS

QUESTION	YES	NO
Were you friendly, respectful and polite to your interviewee?		
Did you explain the purpose of the interview clearly?		
Did you check that your interviewee had the time to meet with you?		
Did you start with a general discussion and then move on to specific		

questions?		
Was your interviewee relaxed and comfortable about answering the questions?		
Were the questions you asked simple and straightforward?		
Did you use the interviewee's language?		
Did you tell the interviewee that all information that he/she gave you would be treated as confidential?		
Did you plan and test the questions?		
Did you record the answers either in writing or using a tape recorder?		
Did you think the interviewee was honest in all his/her answers?		
Were you sensitive towards your interviewee when asking personal questions?		
If the interviewee did not wish to give certain information, did you respect that?		
Were you sensitive to possible gender, age or cultural barriers between you and your interviewee?		
Did you thank the interviewee for her/his time?		
Will you report back to your interviewee once you have finished your research in order to tell him/her what you found and about the project you will run?		

1.6.4.3. WHAT YOU DO WITH THE INFORMATION COLLECTED

Once you have gathered information, you will need to think about how your findings affect the community.



ACTIVITY 12

During your research, you find that a particular community has no primary school. What are the implications of this for the community? Think about or discuss the implications of this with your study group. Write down as many implications as you can think of.

When you think about the **implications** of your findings, you need to try to think about the problems from many different points of view. Here are just a few of the implications of the lack of a primary school in the community:

- Children possibly have to walk a very long way to get to school every day.
- This could also have an effect on their performance at school.
- It could also mean that children choose to stay at home rather than walk long distances. As a result, many children will spend the day with no adult supervision.
- Children will miss the opportunity of getting an education because they are not attending school regularly.

When you do research in a community, your aim is usually to find out how you can help with the kinds of problems that the community has. For example, if your research shows that there are no primary schools in an area and that there is a need for one, your action could be to start a primary school project in the area. As we saw with Grace's pre-school project, actions like these take a lot of planning and hard work.

1.7 USING A PROFILE TO COLLECT MORE INFORMATION ABOUT YOUR COMMUNITY

We saw in the pre-primary school case study in section 1 that Grace was able to tell us a lot about the problems experienced by the Zandspruit community.

Once you have found out about the functioning of a community, you will need to write up a **profile** of the community – in other words, a document in which you identify the resources, problems, opportunities and development needs of the community. You will find the profile useful when you need to develop a plan of action for a community project.

1.7.1. The uses of profiles

Profiles are helpful if you need to collect information that will help you to

- identify problems in a particular part of a community
- identify and understand related needs
- identify what resources are available and what resources are needed
- plan a project

Since you are an ABET practitioner, the projects that you are likely to start will probably focus mainly on adult education. This means that you will need to profile the part of your community that this would apply to.

1.7.2. Designing a profile: a profile of adult education as example

In this section we discuss designing a profile of adult education in a community. It is important to remember that education does not take place in isolation, and that there are many aspects of community life that affect education (e.g. health, infrastructure, family attitudes, employment and poverty). It is therefore important to include all these related aspects in the profile, and to use them to help you to understand the information that you collect.

The information from a profile is useful for **developing a plan** that will **help to solve the problem**. A profile can also be useful in **helping you to recognise a problem**. For example, a farmer may believe that all the farmworkers' children attend the school on the farm, and therefore that there is not a problem. This is where a profile can be useful. It could show that many of the farmworkers' children do not in fact attend school, and that there is actually a serious problem.

1.8 INTERVIEW GUIDE TO ASSESS THE VIABILITY OF AN ABET PROGRAMME

This guide could be useful in researching a programme in your own community. The guide is too long. You will need to work selectively from it.

Is there a need for ABET among the adults in your community?

What do adults in your community need ABET for? Why do the adults need ABET? Is it for their everyday lives, their work etc.? Explain.

Are there at present any ABET classes in your community or area?

- If so, where are they run from?
- Who gives the classes?
- Who funds them?
- What do adults pay to attend?
- Who started the classes?
- Do an equal number of men and women attend? Why/Why not?
- Are those attending mainly young or old? Why is this the case?

- Has there been a high dropout rate in such programmes? Why/Why not?
- In what way have these programmes been successful?

Add any other information about the classes that you think is important.

Is there a need for (more) ABET training in your community?

Do the members of your community want an ABET programme?

- Will they support it?
- Will they be able to pay for classes?

Are there people in your community with the necessary skills and who are willing to give such classes? If so, who?

Where and when would the community want such classes to be held?

Do the people in your community lack income-generating skills? If so, which skills are lacking and why are they important?

Are there any skills-based training or income-generating education projects running in your area? (agricultural skills, food gardens, brick making, sewing, small business management)

- If so, where are they run from?
- Who gives the classes?
- Who funds them?
- What do adults pay to attend?
- Who started them?
- Do an equal number of men and women attend? Why/Why not?
- Has there been a high dropout rate? Why/Why not?
- Who has dropped out of such courses? Why?
- Are those attending mainly young or old? Why is this the case?
- In what way have these programmes been successful?

Add any other information that you think is important.

Is there a need for (more) adult skills-based training in your community? Why/Why not?

Do the members of your community want such a training programme? If so, what types of programmes do they want, and why?

Will they support these programmes?

Will they be able to make any payment towards the training programmes?

Are there people in your community with the necessary skills and who are willing to give such classes? If so, who?

Where and when would the community want such classes to be held?

Family life and general living conditions (as these relate to ABET)

Does the family life of your community allow for such training?

Will the men of the community approve and support the women if they attend ABET classes? Why/Why not?

Will the women be able to leave their families and their duties to attend these classes? Why/Why not?

Will the men be able to leave their families and their duties to attend these classes? Why/Why not?

□ Do living conditions in the community allow for such training?

Are most members of your community involved in some form of employment or self-employment during the day? How will this affect ABET?

Do members of your community have some money available that they could contribute towards such classes and learning materials?

Is there electricity in the area, which would make it possible to hold evening classes?

Is there a community building that could be used for these classes?

Are there any means of raising funds in and around your community for such purposes?

If so, whom do you approach and how? (local businesses, education department, community committee, traditional leaders and so on).

Will the traditional leader/s approve of such classes? Why/Why not?

Is there a reliable postal service in or near your village that would allow you to receive distance education learning materials for such purposes?

An interview guide like this would tell you a lot about a community. You would be able to say whether there is a need for adult education classes in the community. You would also be able to say what type of classes would be most suitable and who they should be aimed at. You will also be able to identify possible problems, such as husbands who will not let wives attend classes.

Once you have obtained the answers to the above questions, you will be able to write up a plan of action. In other words, you will be able to say how you could solve the problem.

- What should be done?
- Who would you involve?
- How will the project be started?

We will look at how to write up a plan of action in the next unit.

1.9. FINDING OUT WHAT THE LEARNING NEEDS ARE

1.9.1. How to find out what the specific learning needs are

We have looked at ways of finding out whether communities have ABET needs. However, you will also have to find out whether there are any **specific** learning needs in an organisation or among a specific group of learners. How do you do this?

One way is to have discussions with learners, potential learners, shop stewards and so on, to find out whether they need to learn any new skills. We will give you some examples of things you could talk about to find out what needs a group of learners has. Remember that you will not always be able to give them the questionnaire to fill in. You could use the following as a discussion guide.

Have there been any changes in your job?

Have you had any training to help you learn your new job skills? What kind?

What kinds of things would you like to learn that would help you with your home and family responsibility?

Which of the following do you need most in your work? Say why.

- reading
- writing
- speaking
- problem solving
- working with numbers

What kinds of reading do you need to do in your work? Say why.

- safety information
- information about using machines
- information about what job to do
- information about benefits such as pension and medical aid

1.9.2. Finding out what special skills learners want to learn

You will need to find out whether your learners want to learn special skills. You could ask the following questions to find out what kind of reading, writing and calculating they can do and which skills they would like to improve.

Do you enjoy reading?.....

Do you often read any of these?	I can do this	I would like to do this better
Newspapers		
instructions for health and safety, recipes		
trade union letters		
letters or contracts from management		
books or magazines		

Do you like writing?.....

Do you need to write these?	I can do this	I would like to do this better
forms such as bank forms or job applications		
letters to family or friends		
formal letters to complain about or ask for something		
crossword puzzles		
stories, poems or songs		
stories, poems or songs		
other (say what)		

Do you like working with numbers?.....

Do you ever need to work with the following?	I can do this	I would like to do this better
money, e.g. work out change		
bank statements or payslips		
bills or accounts		
measure paint, carpets etc.		
work with a calculator		
work with a calculator		
addition, subtraction, multiplication or division		
other (say what)		

1.10. CONCLUSION

We hope that you have enjoyed this first unit.

Let's review what we have covered in this unit. We began by looking at how Grace Molopa did research in her community, and how as a result of her research she was able to successfully start up a pre-school project. We also looked at ways of doing research in a community to find out what the needs of the community are, what resources might be available and how to use this kind of information to start an ABET project. We will be taking these ideas further in the next unit, where we will be looking at how to formulate an action plan for a project.

We hope that after working through this unit you feel better equipped to start up a project, and that this unit helped you to answer the following three questions:

- What will I need to know about my community before I start a project?
- How can I find out about the needs of my community or organisation?
- What kinds of questions could I ask to find out whether my community or organisation needs to start an ABET project?

If you are able to answer these questions, we are sure that you are ready for the next unit.

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UNIT 2: PLANNING AN ABET PROJECT

2.1. INTRODUCTION

In unit 1 we looked at why it is important for ABET practitioners to collect information about communities that they plan to work in. We saw how Grace Molopa found out that the community was in favour of a pre-school project and how she got the project started. We said that when practitioners set up ABET projects it is important for them to find out the needs of the community first and then to shape projects according to these. In this unit we will look at what the practitioner should do next, after he or she has identified community needs. You will find out how to decide what projects to start up and why it is important that ABET projects meet the needs of a community. In this unit you will be answering questions such as

KEY QUESTIONS

- 1 What needs to be done before starting an ABET project?
- 2 What happens if a project does not meet the needs of the community?
- 3 If communities have many needs, how will we know what kinds of projects to start?
- 4 What is a project proposal?
- 5 How can we develop a plan of action for a project?

Mrs Radebe started an ABET programme in the rural village of Xhugxwala, which has very few resources, and where the people are poor. There is no electricity in the village and the people have no access to clean drinking water or toilets. Because of the lack of sanitation facilities many children in the village – especially children under the age of five years – die of gastroenteritis.

There are not enough houses in Xhugxwala and the health and education services are inadequate. There are few buses and cars and the women of the village have to walk long distances to the river to fetch water. They also spend many hours every day gathering wood for cooking fires.

In this unit we are going to look at sections of the case study about Mrs Radebe. We are going to look at the case study in a different way, and we will ask you to think about why it is important for:

- ABET practitioners to understand the community in which they work or are going to work
- ABET programmes to meet the needs of the community
- ABET practitioners to use the organisations and resources that already exist in the community to help when they are setting up and running ABET programmes

Read the case study.

CASE STUDY 1: Mrs Radebe's class

Many of the villagers of Xhugxwala cannot read. (80% of the population of Limpopo lives in the rural areas and the literacy rate is approximately 40%.) Because of a shortage of paid work in the area, many of the strong, healthy, educated men of Xhugxwala have left the region to get jobs in urban areas. Yet in spite of this, more and more people seem unable to find paid work.

[We will now join Mrs Radebe's class.]

The class members say that they enjoy the classes because they like to get together to talk about things and to learn. They also say that they like Mrs Radebe, because she is kind and talks to them respectfully. She does not treat them as if they were stupid when they have difficulties with their reading and writing. However, Mrs Radebe tells us that after the first class her learners did not come back for the second class. She wondered whether she had done something wrong, and did not know what to do.

So she decided to try to find out what the problem was. She sat at the river and spoke to the women when they came to fetch water. She found out from them that, because of the lack of opportunities for paid work, the women did not see why they should work hard to learn to read and write. There were plenty of other things to worry about. They said it was more important to

find and prepare the food for their next meal. They felt that spending time on reading and writing was a “luxury” they could not afford.

Mrs Radebe decided to change her classes. Instead of making literacy the main focus, she said the classes would be about helping with the problems of coping with daily life in the village. People would learn things to help them with their work and their family life. She also went to see the chief and managed to persuade him that the classes would be a good thing. After this the learners began to come back to the classes.

Mrs Radebe is happy to teach literacy as a way of helping the villagers with their problems. She points out that most of them have no money or other resources – and they have needs which require urgent attention. She believes an integrated approach* to learning is best for her class at this stage in their literacy development. So she was happy when the mothers in the class said that they wanted to start a feeding scheme for the village school. They made a vegetable garden and at the same time learnt the nutritional value* of the vegetables. It was not long before the mothers realised that they could sell their surplus produce*. They asked Mrs Radebe to help them in working out how much to charge for their vegetables and how to read and write various words that would help them.



ACTIVITY 1

Read the case study carefully and then write down your answers to the following questions.

- 1 Did Mrs Radebe find out what the most important needs of the community were before she started the ABET learning group?
- 2 Did Mrs Radebe start off by talking to important people in the community, such as the women and the chief, before she started the ABET group?
- 3 Did the community play a part in setting up the ABET group?
- 4 What strategy did Mrs Radebe use later on for re-introducing* ABET into the activities of the women?

Here are our answers, which you can compare with yours.

- 1 The case study tells us that Mrs Radebe did not find out what the community needed before she started the ABET project in the community. Perhaps that is why her learners stayed away from class.
- 2 We can see from the case study that Mrs Radebe did not start off by talking to the community to find out what the important needs in the community were. She decided that an ABET programme was needed in the community. It was only after the learners stopped coming to class that she discovered that the women only wanted to learn things that would help them to earn money or get food. Mrs Radebe was only able to find out about the needs of the women after she spoke to the women and the chief in the area. After this, she started an ABET programme that worked for the community.
- 3 We also know from the case study that Mrs Radebe did not speak to important people in the community before she started her project. It is difficult to get the community members to support a project if the key players in the community, such as the chief and the women, have not been consulted or if they do not have a part in setting up the project. If they are not

consulted they will not support the project and the community members will not be encouraged to take part in the project.

- 4 Later, when Mrs Radebe re-introduced the project, she made sure that she met the needs of the women by finding out what they needed to learn. The women wanted to learn skills that would help them to make money. They needed literacy and numeracy skills that would help them with the kinds of problems they experienced as part of their daily lives.

2.2. Strategising for a project: what do i need to do before starting a project?

We have just looked at a few reasons why Mrs Radebe's learners dropped out* of her class. In the next section, we will look at some important guidelines for planning or strategising* for a project.

2.2.1. Get the community involved in the planning of a project

ABET is important to the RDP because it empowers people to improve their quality of life*. The RDP also tells us that development projects must focus on both people's **immediate** and their **long-term*** needs – what they need now, and what they will need in the future. The RDP applies to all people, no matter what their race, age or gender*.

What do we mean when we say that people must be involved in all the stages of a development project? We mean that people must be allowed to say what the needs of the community are. They must also be part of the planning and the implementation stages of projects. Because of the focus on **people being involved in development**, we see that development is not simply about giving people things, but rather about **empowering people to plan their lives for themselves**. This was important in the case study. The members of the community in our case study were not, at first, asked what their needs were and so the ABET classes did not meet their needs. Later, their participation helped Mrs Radebe to make sure that the ABET project **fulfilled** some of their needs, for instance by helping them to earn an income, protect the environment and help with the school feeding scheme. Mrs Radebe helped the community to survive on their own. They were able to manage without becoming dependent on her. If we are going to achieve this kind of integrated approach to development, people must be able to:

- * analyse* and prioritise their needs
- * control their own development
- * manage local resources

Projects that are driven* by people in the community will have a better chance of lasting because if the community members want the project to succeed (and they probably will want this if they are driving it), they will work hard to make sure that it does succeed.

2.2.2. Collecting the information needed for planning

We saw in the previous unit that before we try to start an ABET project it is important to understand the community in which the project will be operating. To do this you need to ask questions such as

- * Who is the project aimed at?
- * What are the best ways of getting the message across to the target group?
- * What organisations or people in the community will we need to work with?
- * What facilities and resources are available in the area? Which ones will be useful for supporting an ABET learning group?
- * What are the biggest problems facing the target group of an ABET project?
- * How can ABET projects link with other development projects in the community?
- * What organisations, networks*, stakeholders* or role players* could be approached to help with the project?
- * What do the national and provincial policy frameworks say about ABET projects?



ACTIVITY 2

Are you involved in an ABET project or are you able to speak to people who are involved in a project of this kind? If so:

- * Try to find out as much as you can about the project from the people organising it. You can use the questions we listed above to guide your discussion.
- * Try to find out what methods the project organisers used to find out the needs of their target community.
Read the case study on Mrs Radebe's ABET group again.
- * If Mrs Radebe had considered questions like the ones listed above, do you think that she could have avoided the problems that she had at first?

2.2.3. Finding out about the most important needs of the community members

We saw from the case study that Mrs Radebe's learners came to class when they felt that their learning was useful in their everyday lives. This means that it is important to find out what people feel their most important needs to be, and what they want to learn. We call this a **needs analysis**. As we saw in unit 1, there are many different ways of finding out what people want to learn. But we must remember that because many people in South Africa have had little or no education and have not had a chance to say what they think, it is sometimes hard for them to tell you exactly what they need to learn. People cannot say they want to learn about things they do not even know exist.

However, we do not want to teach adults only what they need to cope with their present living and working conditions. That kind of education analyses people's needs in the short term, but does not plan for their hopes for the future or take account of the ways their interests and talents could grow. For these reasons it is also useful to try to find out what people may need to know in order to improve or change their conditions. How do you do this?

One way to do this is to find people in the community who could suggest things that would be useful for people to learn, or people who could help give advice on what learning will be needed to manage different kinds of projects.

2.2.4. Identifying important community needs

People in a community might have many basic needs*. They might need jobs, land reform*, housing, water, transport, energy*, health care, social welfare*, security, free basic education, and career paths*. Because South Africa does not have enough resources to satisfy all the needs of all the people, we need to choose which development projects to start. This is called prioritising. Local communities should decide what their most important needs are, what projects to start, where the projects should take place, who the target groups should be and how the projects should be managed so that programmes meet the needs of the people.

We saw that even though Mrs Radebe meant well, and felt that she had a really good idea for starting a project in a community, her learners did not show any interest in the classes, or else they dropped out after a while. Why? Because she did not involve the members of the community. When Mrs Radebe spoke to the women, she found out that they did not support the project because she was not really meeting their needs. Instead, she had imposed her own ideas onto the community.

An ABET practitioner might first need to help the community to start a project like setting up a small business, and then integrate the teaching of literacy or numeracy later on, when people see a real need for such skills. This is what Mrs Radebe did after she discovered that the women in the village did not regard ABET as a priority in the beginning.



ACTIVITY 3

We saw in the case study that after starting a small business project, Mrs Radebe was able to integrate skills such as budgeting, calculating and reading.

1 *Think about or discuss with your study group what kinds of skills you could integrate into the projects below:*

- * a health project
- * an environment project
- * a vegetable growing project
- * a handwork project
- * a pre-school
- * a brick-making project

2 *Also think about or discuss with your study group why the people participating in these projects might find the skills useful.*

3 *Do you agree that knowledge of reading, writing and calculating will be very useful to people involved in all the projects listed above?*

2.2.5. Building partnerships* with other community-based organisations

Another important task of practitioners who work in communities is to try to form partnerships with other projects or organisations that already exist in the community. We saw how Mrs Radebe's project linked up with a school through their school feeding project. Almost every community is organised in some way, or has support and information networks.

Many organisations find forming partnerships very useful, especially because on their own they do not have enough resources.

In most communities you will find informal structures such as women's groups, burial societies, stokvels and so on. In some communities you may find more formal network groups such as a local development forum or a civic association.

It is important for practitioners to identify groups like these or other representatives of the community and to consult them about setting up an ABET project. Practitioners should try to identify and consult with all the groups in a community that would have skills or other resources to contribute to the project. In the next activity we encourage you to think about who these groups might be.



ACTIVITY 4

If you were thinking about starting an ABET project in your community or company, what interest groups, stakeholders, or organisations would you consult with?

- *List these groups, organisations or stakeholders. We have listed a few target groups in the table below. Complete the table by saying which organisations you could consult for each target group.*
- *Write down why you would contact each of these organisations. Before you begin, have a look at our example involving township women.*

TARGET GROUP	ORGANISATION OR STAKEHOLDER	REASONS FOR CONTACTING THEM
Township women	Church women's organisations	They have a venue to advertise the project and the resources to provide trainers for the project
Youth		
Workers		
Rural women		

Were you interested to see that you need to approach as many interest groups as possible because of the different things they do in the community and because of the different roles they might play in an ABET project?

You may have included other strategies such as

- approaching local businesses or shopkeepers to assist with funding or training
- asking community-based organisations, such as civic or women's organisations, to provide possible educators and to assist with recruiting learners
- asking ABET non government organisations to assist with the training of the practitioners or with teaching a group of learners
- approaching the Education Department to help bring various groups in the community together and to assist with raising funds

Because a community has many different needs, no single organisation or stakeholder will be able to solve the huge problem of illiteracy in our country on their own. This makes it important to form partnerships with other organisations and stakeholders and to involve as many people

as possible in the project arrangements. These kinds of partnerships can make a valuable contribution when it comes to project planning, convincing people about the importance of the project, sponsoring research and development, and fund-raising for the project. In this way we mobilise* all the resources of the community around ABET and development.¹ The Department of Education makes this point in the *White Paper on education and training* when it says:

The main organizational principle of the national ABET programme will be the building of partnerships of all constituencies with a vital interest in the ABET enterprise, including organized labour and business, government, media and other stakeholders. The partnerships are expected to undertake planning, arrange public advocacy*, sponsor research and development, and mobilize financial resources for the programme (Department of Education 1995:31).

What the above quotation stresses is that the more people you consult and get help from, the more likely you are to arrive at solutions that will meet and serve community needs. Practitioners often find that they need to negotiate* solutions. You can try some low-level negotiating in the next activity.



ACTIVITY 5

You are a member of an ABET committee of the local development forum in Tembisa in Gauteng. The committee has agreed to start an ABET project among unemployed youth in the area and it needs to raise some money for the project. In the meeting various suggestions were made. Some of these were:

- *to ask a church for a donation*
- *to ask local business for funding*
- *to go to the bank to ask for a donation*
- *to approach the local RDP office for funding*
- *to ask foreign donors for money*
- *to organise local fund-raising activities such as a stokvel party*
- *to try some combinations of the above*

Which of these do you think they should try? Think about this, or if you are in a study group, you may want to hold a discussion or debate with some of the members about which is the best approach.

Before arriving at a final answer about the best possible solution, consider:

- *each of the possible sources of funding*
- *what other information you need about each source before being able to make a choice*
- *in what ways each of the sources are similar and how they differ*
- *what the advantages and disadvantages of each of the funding strategies are*
- *which of the approaches is likely to succeed in a short time*

There is no single correct answer to the above activity. In some communities approaching one source of funding might work best, and in another community, approaching another source would be best. You can see why we say that there are no recipes for setting up development projects. All plans and solutions should involve as many interest groups from the target area as

possible, because the people belonging to the target community understand the community best.

STUDY SKILLS: Solving problems and thinking critically

In the last activity you had to think about the advantages and disadvantages of various ideas.

Getting together in a group and brainstorming until you have a list of solutions is a very good way of solving problems. Remember, however, that finding solutions is not always easy. Why? Because all ideas, even good ideas, contain some negative points. One of the important aspects of being a **critical thinker** is always looking out for these negative points. Sometimes it is hard for us to look for the negative points in our own ideas, but we really need to do this when we are working in community projects. Sometimes we have to choose a certain solution even when we know that the solution is not perfect. This is one of the difficult things about problem solving.

Let's get back to planning a project. We have put together a few suggestions to form a checklist. You may find a checklist of this kind useful to ensure that you involve as many people as possible in the planning and implementation of a project.

2.2.6 Project planning checklist

We have made a list that you may find useful for checking that you have gone through all the steps when you plan a project. There is space at the bottom of the list for you to add some of your own ideas. We have included boxes for you to tick to show the steps you have already completed.

Have you:

- visited the community leaders and explained the project?
- consulted community members?
- asked the members of the community to identify their needs?
- identified which other organisations, stakeholders or role players could be approached to help with the project?
- formed any partnerships with existing organisations?
- analysed your target group?
- thought of ways of getting the message across to the target group?
- identified facilities and resources available in the target area that may be useful for supporting an ABET learning group?
- identified what the biggest problems facing the group at which the ABET project is aimed are?
- identified ways that the ABET project can link with other development projects in the community?
- considered what the national and provincial policy frameworks on ABET say about ABET projects?

Let us now think about how to develop a strategy or a plan for making the project work.

2.3. DEVELOPING A PROJECT PLAN

In this section we have included another case study. It is a proposal for setting up an ABET programme for rural women in the Eastern Cape.² As you read it, you will notice that it includes various steps for or stages in setting up a project. Whenever you start a project, you will need to draw up a plan like this one. We call a plan for a project a **project proposal**. The project proposal must tell the person reading it

- what the problem is
- how the problem can be solved
- why a project of this kind is a good idea
- what we need to do to get the project started

Read the case study and answer the questions that follow.

Case study 2: Starting an ABET project for rural women in the Eastern Cape

1. The problem and the present situation

The women, particularly the black women, in the Eastern Cape find themselves in a very difficult situation. Like all black women, they have been excluded from the political process and they have also been regarded as being inferior to men.

Because of their low status, many women in the Eastern Cape have had little or no education. However, they assisted in the struggle against apartheid, they have kept their families together and they have managed to ensure that their children receive some schooling.

One of the factors that could contribute to a successful ABET project in the Eastern Cape is that the women in the area are already well organised. Many of the women in the area belong to a women's organisation, a civic organisation, a church group, or other community organisations. Another advantage of starting such a project in the area is that there are a number of literacy NGOs and universities in the Eastern Cape. These can play a useful role in providing educational support for an ABET project. If such a project were to be started, the project could get help and advice from the Independent Development Trust, the Joint Education Trust and Operation Hunger.

However, ABET projects in that area would have to overcome problems such as

- poor infrastructure*
- a lack of job opportunities in the formal sector*
- the very large geographic area
- large families
- high levels of alcoholism, and
- various forms of social disintegration*

2. Rationale

There are many good reasons for starting a project such as this, for instance to

- show what can be achieved in a short period of time
- empower women through education and training
- enable women to participate in reconstruction and development
- offer basic education and skills to women

- develop women as leaders
- strengthen women's organisations
- encourage economic development among women

The project will also be useful to other practitioners. What we learn from the project can be shared with practitioners who want to start ABET projects in other places.

3. Target group

The Eastern Cape is the second most impoverished province in South Africa, with a 72% poverty rate.

- The ABET project should reach 40 000 to 50 000 learners.
- The project requires 1 250 teachers.
- Each teacher should teach two groups of 40 learners per group.
- The project will need 125 people to help with the organising.
- Three teacher training courses for 50 teachers each (pre- and in-service) will be needed.

4. Mobilisation

A special advocacy team must be established. This team must make the community aware of the project and of the importance of education for individual and community development. The government must set up a structure to coordinate this work.

The following events and media should be considered to make people aware of the ABET project:

- meetings
- music
- popular theatre
- puppetry*
- radio and TV

5. Management of the project

A project management team must be formed. This team must involve local leadership and form partnerships with educational and development organisations. First, the team must gain entry to the community. Then it must help to recruit learners and educators, find facilities and connect learners with other development projects in the area.

6. Evaluation

The project must be evaluated* while it is running. Women should be involved in the evaluation. This will equip the women with extra skills.



ACTIVITY 6

Read through this proposal again. Underline each important step. Then write these down as a list of key steps to guide you in developing a proposal for an ABET project in your area.

Here is our list. Your list may look a bit different – that is absolutely fine, as long as you have included more or less the same information as we did.

2.3.1. Step one: Provide a background to the project

You will need to think about:

- what is the problem?
- whom does the problem affect?
- how does the present situation affect the problem?
- are there any relevant statistics*?
- what key organisations, networks, resources agencies and stakeholders are there in the community?
- what possible obstacles are there to the project?

2.3.2. Step two: Give reasons for planning the project in your community (the rationale)

You may have identified a serious problem, such as poverty. Your strategy may provide a solution to part of the problem, but the problem is so big that you cannot solve it completely. For example, a brick-making project may be a response to the problem of unemployment. The project may give some people jobs, but it certainly will not solve the whole problem of unemployment in the area. Try to set out realistic objectives. If your goals are too big, you may make it impossible to measure your progress, to see whether you are succeeding or not. You should plan in such a way that the achievements in the project can be measured. It is also useful to start with short-term goals, and then identify medium- and long-term goals.

Some things you could include are:

- other development projects which ABET could link up with or which could be used to help introduce ABET
- how an ABET project can help strengthen local organisations
- how ABET can contribute to the RDP in the area

2.3.3. Step three: Identify possible target groups

Some things you could include are:

- agree on the target groups
- try and find out the size and location of the target group

2.3.4. Step four: Get the support of the community (mobilisation)

Some things you could include are:

- set up a team to tell the community about how it could benefit from an ABET project
- work out the message and think about how to put the message across to the target group

2.3.5. Step five: Set up a local ABET committee (management)

Some things you could include are:

- make contact with the relevant stakeholders and ask them to nominate* representatives
- work out the detailed functions* of the committee with the stakeholders

STUDY SKILLS

Did you notice that the language in the extract was a bit different from the language we use in the rest of the ABET course? Did you find it more like the language in the quotation we gave you from the White Paper in section 2.5?

The project proposal uses the formal language that people in NGOs and projects need to use when they apply formally to funders for money. As you saw in our list, formal words often refer to very simple ideas. So, a word like “rationale” is really just a formal way of saying “reasons for a project”.

Why do you think we use this kind of language? Think about the way you speak to different people in the community. Would you speak to a church minister in the same simple way that you would speak to a young child? When you write a project proposal you want to show people that you are writing seriously, so you use words like “rationale” and “mobilisation” instead of more simple words.

2.4. DEVELOPING A DETAILED PLAN OF ACTION

The list below indicates to us:

- what we should do **before the first day** of the ABET project and the
- what must be done **on the first day** that classes start

The following checklist will be of help to you when you set up a project. You can tick off the various tasks once you have completed them.

CHECKLIST (What to do before the first day)

- Have you decided on the starting or implementation date*?
- Have you decided how many learners you wish to target?
- Have you defined who the target group is (age and gender)?
- Have you found a suitable venue to hold your classes?
- Have the ABET practitioners been trained?
- Have you bought the teaching materials?
- Have the registers and record cards been bought or made?
- Has the ABET committee consisting of stakeholders been set up?
- Will the committee help to plan, implement, and evaluate the ABET project?

CHECKLIST (What to do on the first day)

- Will the planned number of learners meet at the right venue?
- Have the stakeholders agreed on the venue?
- Has someone made arrangements for you to use the venue?
- Is there an ABET practitioner (teacher) for each group?
- Have the ABET practitioners been trained?
- Does each ABET practitioner have a set of teaching materials?
- Does each ABET practitioner have a class register and other record-keeping documents?
- Do the learners have the materials they will need to start learning?

- Does the community know about the ABET project?
- Are other organisations in the community aware of the project?
- Are organisations working together to achieve the goals?

When you develop a plan of action, the first thing to do is decide on the date on which the classes will start. Then work backwards from that date to set target dates for all the work that needs to be done before the starting date you decided on.

Here is an example so that you can see what we mean. Let's look at the plans for an ABET project in Limpopo.

Proposed Plan of Action for the Limpopo Women's Project to begin in January 2012

STEP 1: June 2011 to August 2011

- approach key organisations, role players, and networks in the communities
- agree on the best methods for getting the community to support the project
- set up a committee to manage the planning of the ABET project and to help mobilise the community
- identify key women who could help with the project
- conduct needs assessment

STEP 2: September 2011 to December 2011

- recruit and train local ABET practitioners
- develop or buy learning materials for the target group
- form women's groups
- do final preparations for project

STEP 3: January 2012

- start the ABET project in the middle of January



ACTIVITY 7

Look at step 1 of the plan of action. There are a lot of tasks which need to be done from June to August. We have divided them into categories to make sure that all the areas of work will be covered. Here are our proposals for a detailed plan of action for completing the tasks within the three-month period. Do you think we have organised our tasks appropriately? Do you think we are planning to do things in the right order? And do you think our plan is feasible?*

Task	June	July	August
Set up an ABET project committee	Identify the key role players, stakeholders, organisations and so on. Arrange to meet with representatives.	Meet with all the key role players and discuss setting up a committee.	Arrange to hold a meeting in the first week of August in order to set up the committee.
Do a needs	Start collecting	Continue collecting	Identify key people in the

Task	June	July	August
analysis	information about the problems in the community and find out about existing development projects.	information about the problems in the community and about existing development projects.	community who can help to do the needs analysis. Decide what information should be collected. Decide on how the information will be collected. Start doing the needs analysis in the middle of August.
Get support for the ABET project in the community	Collect materials on different ways of getting support for ABET. Try to work out which audiences in the community need to be targeted, such as the traditional leaders, women, potential teachers, political leaders.	With members of the community, start working out what we need to tell the different target audiences. Work out how to get these messages across to the different target groups.	Once the committee has been set up, start a publicity drive so that you can get the message across to the different target groups.
Train women to help with the planning	Identify women who can assist with the planning of the project.	Agree on which of these women will assist with the planning and which will work on formulating the questionnaires.	Train the women and prepare the needs analysis questionnaire. Start doing the work in mid-August.



ACTIVITY 8

Now look at Activity 7 and see whether you can construct a plan of action. Imagine that your local community has agreed to start an ABET project. They would like to launch the project four months from now. Make a list of all the tasks that would need to be done before then. List these in the shaded blocks of the chart. Write the months between now and your target date in the top row. Then fill in what needs to be done and indicate when you will complete the various tasks over the next four months.

Have you completed your plan of action? Do you think that your project will start on the planned date?

2.5. CONCLUSION

Did you find certain sections of this unit difficult? If you did, what did you do about it? Before putting your books away, think about what you have learnt in this unit. Here is a list that acts as a summary – if you would like to add additional points, you are most welcome to do so. Tick the items you feel you have mastered.

In this unit I learnt

- how to decide on what projects to start in communities
- why we should get the community involved in the planning of a project
- ways of finding out who the target group is
- why it is important to use facilities and resources that are available in my area to support an ABET learning group
- what kinds of organisations, networks, stakeholders or role players could be approached to help with an ABET project
- how to develop a project plan
- what a project proposal is
- what a project proposal should tell us
- how to ensure that a project meets the needs of the community
- why it is useful for the community to help with the setting up and running of a project

GLOSSARY

Advocacy	Advocacy means support for or recommendation of an idea, policy, cause or event. This could involve a group of people from inside the community telling the community about the benefits of a project such as an ABET project.
Analyse	When you analyse something, you think about it carefully in order to understand it better.
Basic needs	The things that we need in order to live are our basic needs. These are things like water, food and shelter.
Career paths	A career path is made up of all the job experiences that a person has during their career. This can include opportunities for promotion.
Driven	If we say a project is driven by the community, we mean that it is run and managed by the community.
Dropped out	When people drop out of a class, it means that they stop attending – in other words, they stop coming to class.
Energy	Energy is the power we use to heat water, to cook and for lighting when it gets dark. Some sources of energy are wood, paraffin and electricity.
Evaluated	If you evaluate a project, you look carefully at the project and try to find out what is good and bad about a project so that you can decide whether it is working or not.
Feasible	When we say that something is feasible, we mean that it is possible or that it can be achieved.
Formal sector	The formal sector consists of companies, shops and factories that pay tax. The employees work normal hours, and receive regular salaries.
Functions	We call the tasks or jobs that we do functions. Teachers have many functions. These include assessing learners, keeping records and so on
Gender	A person's gender is their identity as a man or a woman.
Implementation date	This is the date on which we start doing something. The implementation date of a project is the date that a project will start on.
Infrastructure	Infrastructure refers to services such as water and sanitation, or structures such as roads and railways. We also use the word infrastructure when we refer to organisations such as local government or community organisations that help a community to work.
Integrated approach	In the ABET context, an integrated approach combines teaching people about how to solve their problems with teaching them literacy. Mrs Radebe's teaching is an example of an integrated approach. She teaches literacy while helping her learners to solve their everyday problems.
Land reform	Changes in laws, regulations or customs that control who owns land.
Long term	Long term means for or in the distant future. If you do long-term planning, you are planning for the distant future.
Mobilise	To mobilise means to encourage people to either support something (such as an ABET project) by working for it or to join it (for instance to join the project as a learner).
Negotiate	When you negotiate, you try to reach an agreement with a person, group or organisation that wants something different from what you want.

Networks	Networks are groups of people who link up to share information or resources. If you were part of an ABET network, you would link up with people from other similar projects.
Nominate	When you nominate someone, you choose that person.
Nutritional value	The nutritional value of a food is what that food is made up of, and how it affects our bodies. Foods with a greater or higher nutritional value are better for us than foods with a lower nutritional value.
Partnerships	If you form a partnership, it means that you join up with someone or with an organisation in an equal relationship. The partners in a partnership all have equal power.
Puppetry	This is the use of puppets to tell a story. Puppets are dolls that you can move, either by pulling strings that are joined to their heads, legs and arms, or by putting your hand inside them.
Quality of life	Quality of life refers to how satisfied/happy or dissatisfied/unhappy a person is with the circumstances he or she is living in.
Re-introducing	When you introduce something to people, you show it to them for the first time. When you re-introduce a thing, you show it to people again, but you want them to think about it in a different way. When Mrs Radebe re-introduced the project to the women, she had changed it so the women looked at it as if it was a new thing.
Role players	Role players are people who play a part in/are involved in the project and the community.
Social disintegration	The breaking up or destruction of families and community structures.
Social welfare	Programmes or measures that the government introduces to ensure the wellbeing of people. These measures or programmes usually offer economic help or relief to people who need it.
Stakeholders	Stakeholders are people who are directly involved in or affected by a project. In an ABET project, stakeholders include the practitioners, the learners, the community, the business sector, and trade unions.
Statistics	Statistics are information that is written down in the form of numbers. Usually, statistics are used to show things like the number of people in a community, how many people have jobs and how many people can read.
Strategising	Strategising is another word for planning. A strategy is a plan of action that tells us what must be done, by whom and by when.
Surplus produce	In this case, surplus produce refers to the vegetables left over after the women had taken what they needed for their families to eat.

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UNIT 3: Managing an ABET project

3.1. INTRODUCTION

In the previous two units we looked at what we should do before starting a project. In this unit, we want to discuss what happens after a project has started and what a project manager can do to make sure that the project will run smoothly. We will visit the Masisisane Learning Centre and meet with Mrs Vilakazi, the project manager.

If you are an ABET practitioner, and especially if you are in a managerial position, you will probably have to do many of the tasks that Mrs Vilakazi has to do. In order to see what these kinds of tasks are, we will look closely at the kinds of things Mrs Vilakazi does when she manages the adult education project at the Masisisane Learning Centre. We know from the previous units that a project must be managed, because if it is not, it may not achieve its aims. For example, if Grace Molopa's Realeboga Pre-school project was not managed properly, it is possible that the pre-school would not have given children the right kind of early learning experiences, or that it might even have closed down after a short while.

In this unit we will look at some management issues that may be useful for you as a practitioner. We will try to help you answer the following questions:

KEY QUESTIONS

- 1 As a project manager, what are my functions?
- 2 Why must the activities of the organisation be coordinated?
- 3 Why should staff help to make decisions about the project?
- 4 How can I be a good manager?
- 5 How can I deal with conflict between my staff members?
- 6 What does "accountability" mean?
- 7 How do I write a report about the activities of the project?

Let us begin by looking at the duties that Mrs Vilakazi performs as part of her role as project manager.

3.2. THE MANAGER AS COORDINATOR

Mrs Vilakazi tells us that a lot of her work involves organising and coordinating the work of a team of ABET practitioners at the Masisisane Adult Education Centre.

Case study: Coordinating the staff

"I have quite a busy day," she says. "I have to organise the Centre and I also teach two basic literacy classes."

She tells us that Masisisane Adult Education Centre has four ABET practitioners: they are Mr Peters, Mr Xulu, Mrs Hlophe and Ms Sibiya, and of course there is Mrs Vilakazi herself. There is also an administrator, Mr Sithole, who is responsible for the project's filing system and for general letter writing. He also has to keep people informed of meetings and other activities at the Centre. Apart from teaching, each of the teachers has a number of other jobs to do. Mr Peters is responsible for community liaison*. He has to stay in contact with people in the community to see that the Centre remains in touch with community needs. Mrs Hlophe is in charge of the library and arranging outings and visits for the learners. These outings need to be

very carefully organised. Mr Xulu deals with buying equipment and drawing up the timetable for the Centre.

Ms Sibiya teaches community courses such as permaculture and job skills, and she also manages other projects, such as the newly started street children feeding scheme.

Recently, the Centre employed Ms Gaduka. She comes from Mpumalanga. She is a trained bookkeeper and her main duty is to administer the budget.

Mrs Vilakazi says, “My days are filled with preparing for my classes and I spend a lot of time organising so that things at the Centre go according to plan.”



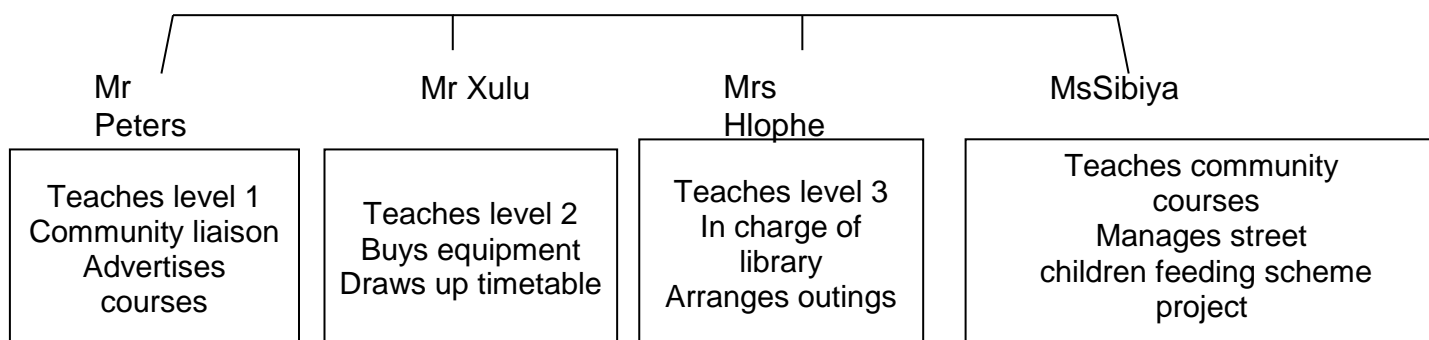
ACTIVITY 1

We see from the case study that the Masisisane Adult Learning Centre has a staff of six people in addition to Mrs Vilakazi. Each staff member has a specific function.

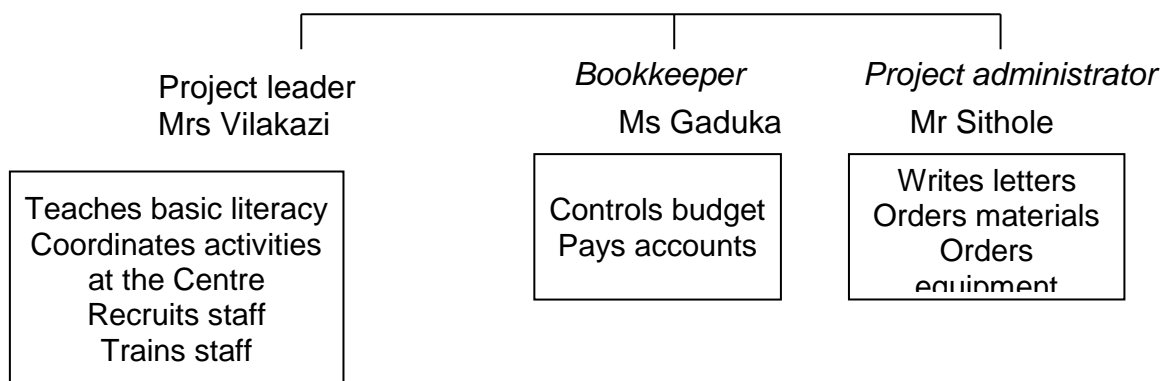
Draw a diagram indicating what each staff member does.

A diagram showing the staff of an organisation and what their functions are is called an organogram. Our organogram of the Masisisane Learning Centre look like this:

The staff at the Masisisane Adult Learning Centre
TEACHERS



ADMINISTRATION



We now have a clear picture of who works at the Masisisane Adult Learning Centre and of the kinds of things that they do. The diagram makes it easy to see what each person's responsibilities are. If you need to see the person who teaches the level 2 class, or if you need to buy material and books, you can look at the organogram and you can very easily see whom you need to contact.

You can see that an organogram is especially useful if there are a number of people working in an organisation. It might be a good idea to draw a big chart like this for your organisation and put it up in a place where staff members can refer to it when they need to.

Because there are so many people involved in the project and because there are so many different jobs to be done, Mrs Vilakazi has to spend a lot of time making sure that there is coordination* between the activities of the various staff members. Can you imagine what would happen if there was no coordination?



ACTIVITY 2

Let us look at what would happen if Mrs Vilakazi did not coordinate the activities at the Centre.

One way to coordinate activities is to use a month planner or a year planner: staff members fill in the details of their activities on the planner as a way to avoid clashes. Here is a list of the activities that Mrs Vilakazi and the staff members will be involved in during the month of February. Transfer this information to the month planner for February that appears below the list of activities. Some of the activities will clash with others – which are they?*

- *Film show for fund-raising at 20:00 on 23 February in school hall*
- *Mrs Hlophe to take level 3 class on an outing at 13:00 on 18 February*
- *Level 3 class on 30 February*
- *Compulsory meeting for all staff on 1 February at 10:00*
- *Level 1 class to meet in room 4 at 18:00 to 20:00 on 16 February*
- *Puppet show for children from local pre-school at 11:00 in hall on 13 February*
- *Mr Peters to attend meeting at IEB on 1 February at 10:00*
- *Cake sale at 13:00 on 2 February*
- *Church service in school hall on 12 February 10:00 – 12:00*
- *AIDS exhibition in hall all day on 13 February*
- *Four-day exhibition in school hall from 20 – 24 February*
- *Mrs Hlophe to see book representative for new materials at 13:00 on 18 February*
- *Level 1 classes every Monday and Wednesday at 16:00 in room 1*
- *Level 2 classes every Monday and Wednesday at 17:00 in room 2*
- *Level 2 class moved to room 4 from 17:00 – 19:00 on 16 February*

FEBRUARY						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

When you filled in the various activities on the February month planner, did you discover any clashes? We did! If Mrs Vilakazi had asked the staff to fill in their activities on the February planner, many of the problems that we found would not have occurred. The problems we picked up were:

- On 1 February there was to be a compulsory meeting for all staff, but this clashed with Mr Peters's important meeting at the IEB.
On 13 February there was to be an AIDS exhibition in the school hall at the same time as the nearby pre-school was to use the hall for a puppet show. On 16 February the level 2 and level 1 classes were to use room 4 at the same time.
- On 18 February Mrs Hlophe was to take her class on an outing. But she had arranged to meet with a book representative from a local publisher at the same time.
- On 23 February there was to be a film show in the hall. Although the show was to be held in the evening, the hall was to be used for a four-day exhibition from 20 to 24 February.
- And then, of course, there is no 30 February!

When several people work on a project, their work has to be coordinated. And there must also be some way to make decisions together so that the staff can work together as a team while the project is running. When we talk about **coordinating** and **making decisions** in a project we are actually speaking about two important **management roles**.

3.3. MANAGEMENT AND THE AIMS OF A PROJECT

One of a manager's most important jobs is to make sure that the project is **directed** and **guided** to achieve its aims. As part of our thinking about project aims, let us return to the Realeboga Pre-school project and to the Eastern Cape Literacy Project from the previous two units.



ACTIVITY 3

Think back to these case studies. You may have to re-read parts of these units before you are able to answer the questions.

- 1 When Grace (case study in unit 1) started the Realeboga Pre-school project, she had certain aims.
 - What did she hope to achieve?
 - Why did she want to start the pre-school project?
- 2 In the case study in unit 2, we looked at an action plan for a literacy project in the Eastern Cape.
 - What did the organisers hope to achieve with this project?
 - What were their aims?
 - Why did they want to start this project?

Both of these projects had certain aims:

- 1 Grace wanted to provide opportunities for children under six years of age to attend a school that was near to where they lived. She wanted the children to be safe and warm and to have some early learning experiences.
- 2 The planners of the Eastern Cape literacy project wanted to provide opportunities for adult women to join a class at a time and place that suited them. One of the main aims of the literacy project is to enable the women to read and write in a way which is relevant to their daily lives.

In both the projects, **the manager's role is to ensure that the projects achieve their aims.** We saw in the previous units that many people were involved in helping to achieve these aims. The manager needs to guide and motivate the people involved to see that the aims are met so that the children from Zandspruit have a good pre-school to go to and that the Eastern Cape women have classes where they will learn the skills they need. But we need to ask: Do the project's aims remain the same forever, or can they change as the project progresses?



ACTIVITY 4

Think about or discuss the following problem with your study group:

What would happen if some of the teachers at the Realeboga Pre-school became worried about the large numbers of children between the ages of eight and ten years who roamed* the streets after the local primary school closed? What if some of the teachers decided that these children should attend the Realeboga Pre-school in the afternoons so that they could be cared for and so that their homework could be supervised?

- Does this mean that the project has new aims?
- Is it possible for projects to change or develop their aims?
- Do you think that the project manager should simply say “no” to the idea?

Once again, there are no automatically correct answers to these questions. There certainly are cases and situations where the goals or aims of projects might need to change. Sometimes new ideas lead to changes in project aims. Sometimes other needs in the community make the staff at the project think of new ways of doing things.

What is important is that managers must be prepared to **listen** to new ideas and also to **accept** new ideas. Managers who are not willing to think about new suggestions may find that staff begin to lose interest in the project (Cohen 1994; McIntyre 1995:223).

Staff members should have the freedom to make suggestions about anything, and they should have the freedom to suggest even changing the aims of the project. This does not mean simply throwing out the original aims of the project; it means thinking up **new and perhaps better ways of achieving the aims**.

You can see from this that managing a project does not mean that one person forces his or her ideas onto the rest of the staff. Instead, people must be allowed to take part in making decisions. If the project leader allows staff to join him or her in making decisions, the staff will also understand that sometimes the project leader needs to have the “power” to exercise his or her judgement*. If the project leader never lets the staff members take part in the decision-making process, the staff may not give the manager the support that he or she needs.

Good management encourages people to use their own judgement in project decision making so that they become responsible for certain activities.

3.4. MANAGEMENT IS ABOUT SHARING IDEAS

As we have just said, the management of a project does not mean that one person, or even a group of people in a project, has all the power to make decisions. Decision making should always involve broad discussions with many people both inside and outside the project. If you do this you will find that the decisions that are made will be based on a variety of views.

In our case study of the Masisisane Adult Learning Centre, Mrs Vilakazi says that finding out what people think is an important part of her job as project manager. Read the case study below to see what she says.

Case study: We need to listen to one another

“Do you remember that when you visited my classes last year, I told you that I thought ubuntu was very important in our teaching? I said that it was good because it encouraged people to help one another, to listen to one another, to work in a team and to respect one another's dignity. I try to encourage the spirit of ubuntu in my management style as well. One of the ways that I use to try to get ubuntu established is to get my staff to speak to one another and to listen to one another.

“Every day I have to speak to the staff to find out if they have any problems or whether there is anything they would like to discuss. There is usually something they need to discuss. For example, in February a few teachers were worried because they had too many learners in their classes and they couldn't manage such large classes. And last week Mrs Hlophe was worried because she did not know how to upgrade her teaching skills.

“So,” Mrs Vilakazi says, “you can see that I need to spend a lot of time listening to problems and discussing them. Although I can sometimes solve the problems on my own, we either speak to one another on an individual basis or sometimes we discuss these problems in a meeting. It is important that we all collaborate* on finding solutions and on making new decisions. This helps

us to form a workplace community.”

Mrs Vilakazi makes sure that she has time **every day** to listen to the problems experienced by the staff members. She also likes them to listen to one another. She sees this listening as fitting in with the spirit of ubuntu, because she says that problems are not individual problems. It is important for people to share their difficulties with one another. Also, she says, if they do, they seem to think of better solutions to their problems.

Supportive feedback helps people to become more competent.



ACTIVITY 5

Read the case study again. Take note of the two problems that Mrs Vilakazi recently had to discuss with her staff. They were:

- *classes that are too large to teach*
- *teachers wanting to update or improve their teaching skills*

*Talk about these problems with your study group. Think of as many ways as you can of solving these problems, and see how many solutions you can arrive at. Thinking about problems in this way is called **brainstorming***. You will be surprised at how many different solutions you can think of! It is always best to brainstorm in a group – that is why we asked you to do this brainstorming exercise with your study group.*

Write down all of the ideas that come out of the brainstorming exercise. Once you have written up your list of solutions, you will need to discuss each of the ideas. As we told you in unit 2, even your best ideas will contain some negative points, so it is important that you look for the advantages and disadvantages of each idea. Arrange your ideas and solutions in order from most suitable to least suitable.

We have not given any of our solutions to the two problems in this activity. But if you did this activity, you will have noticed **how many** solutions you were able to identify by discussing the problems with the group, and you will also have noticed how the solutions were enriched* through the discussion. It is a good idea to encourage staff members to talk about problems and find solutions with one another. This is one way in which a good and fair manager can allow the management process to be shared by the various people in the project. This means that all the members of staff will have the right to make decisions about parts of their work and they will not be expected to simply follow instructions. So, through getting teachers to discuss things, Mrs Vilakazi is able to encourage her team to solve problems like the problems of classes that are too big or the need to upgrade teachers' skills. This is one of the ways that Mrs Vilakazi likes to keep the spirit of ubuntu alive among her staff.

When we make decisions, we need to think about the views of all the other people involved. If we do this, we are able to arrive at well-informed decisions.

3.5. Sharing ideas spreads power

You saw from activity 5 that sharing ideas gives good solutions. If we do not involve other staff members in making decisions, the decisions may be one-sided. We saw in the case study of Mrs Radebe that until the women were consulted about their needs, they were uninterested in

the project and the project did not turn out in the way that Mrs Radebe had hoped. If people have been left out of decisions that affect them, they will probably resist the decisions that have been made.

On the other hand, if we include people in the decisions about the project, we can empower* them to see that they can contribute towards the success of the project (McIntyre 1995:205; Flood 1993:231).

3.6. Supportive management

Mrs Vilakazi says that as part of the function of coordinating the activities of staff members, managers should also ensure that they give members of staff feedback* on what they are doing. She says that in the spirit of ubuntu, she encourages her staff to motivate one another so that they can perform with confidence. She says that she does not like the old management style that focuses only on finding mistakes and on correcting other peoples' behaviour. Rather, she says, today's manager must inspire* people and encourage them. Today's manager should listen to why people are doing things in the way that they are, and he or she should allow them to talk about other possible ways of doing things. Good managers should encourage and support their staff's efforts.

Ubuntu means treating people with dignity. This is not only important in the classroom. It is also important that we as managers treat people with dignity, and one of the ways of doing this is to listen to their views.

Now that we have seen that good management involves encouraging and supporting staff to contribute to the decision-making processes, let us consider what else Mrs Vilakazi sees as part of her function as a manager.

3.7. Good managers must keep up to date

Mrs Vilakazi tells us how important it is for her to keep up to date*. She says that there are many new developments in the field of ABET, and so she has to make sure that all those participating in their project are aware of new decisions.

Case study: We need to keep up to date on new ideas

"I need to keep up to date on what is happening in ABET in South Africa. A lot is happening around the system of assessment, in curricula and in materials development. Because the new ABET system is not in place, we have to keep our eyes and ears open for any new ideas.

"I need to keep the staff informed because new developments in ABET will affect them. I also encourage the staff to look out for information that may affect the way they run the project.

"Of course," she says, "I don't encourage them to simply take in* this information. I encourage them to think critically about all new information and to debate different issues. Because I encourage them to take an interest in new developments, you can see that it is a good way for the teachers to guide and coach one another into understanding new ideas and new developments."

Mrs Vilakazi recognises that for a project to succeed, the members of staff have to know what decisions are being made, and they also have to participate in the decision-making processes – even in the case of decisions about policy issues.

In the previous two units, we spoke about the importance of partnerships. We said that they

could be useful in sharing resources and skills. Here Mrs Vilakazi has suggested another good reason for forming partnerships: they can provide a useful way of getting people together to explore new developments in ABET and of encouraging discussions on different ways of handling ABET-related problems. This is a good way of keeping staff updated on new developments. Even if the staff do not agree on everything, the partnership could provide a good basis for discussions and could offer a useful way of thinking about new ideas.

3.8. DEVELOPING AND MAINTAINING A CULTURE OF MUTUAL RESPECT

Mrs Vilakazi tries to encourage the staff to speak to one another about decisions that they need to make. Because she is a firm believer in the ubuntu philosophy*, she says that it is also important for her to create a culture of respect* so that people can feel comfortable with one another.

Mrs Vilakazi's discussions would not work if her staff members were afraid to speak to one another. Ubuntu will help managers to create an environment where people will not become defensive* about their work because they feel that the others will just be looking for their mistakes. If people become too defensive they will not want to listen to anything that the others say. If they are always afraid of being criticised, they will not really feel comfortable about making a decision (Flood 1993:236). However, she says, ubuntu will help people to understand that a problem in the organisation is a collective problem and that the group must help to solve it.

If a project manager expects people to take responsibility for their work, he or she must not stand around "watching" people work, and waiting to find mistakes. However, if a manager feels that a person has done something that the other members of staff may find unacceptable, then he or she needs to talk about it in a way that gives the person a chance to explain why he or she did what he or she did. A good manager could then suggest how the person could do things differently in future.



ACTIVITY 6

Have you ever tried to solve a problem by putting yourself in someone else's shoes?

Mrs Vilakazi tries to get her teachers to respect one another. She says that if people respect one another they will be able to solve most problems. But she says they need to be able to put themselves in one another's shoes. Let's see if this is possible and if it works.

In your next study group, have two study group members role play a disagreement. The two people could disagree on how the hall should be used on 13 February, for example (page back to activity 2).

- *Person A should say that he or she thinks it is a good idea for the pre-school to use the hall for the puppet show, and*
- *person B should say why it's important to have the AIDS exhibition on that day.*

Each should listen to what the other person is saying, and each should try to understand each other's point of view. They should try to come up with some good ideas that will solve the problem, and because they respect each other, they should show that they are able to understand each other's points of view.

In the role play, were the two members able to come up with a solution? Did they find it easier to do this by seeing the other person's point of view, or putting themselves in the other person's shoes?

Now we will look at a situation where person A and person B are unable to reach a solution. This will show us how Mrs Vilakazi handles conflict.

Mrs Vilakazi says that even though she tries to encourage a spirit of ubuntu, sometimes something happens and then there is a bit of tension between staff. Sometimes she knows from the gossip that there is a problem, but sometimes she can actually hear the staff shouting at one another. This is what she says:

Case study: Sometimes I need to deal with conflict between staff members

"I often have to spend time mediating in disagreements between the members of staff. If the conflict is between two of the members, I call a meeting between these two to allow them to air their views and help them to reach some solution. Occasionally I have to offer a suggestion about how the conflict can be handled.

"Once Mr Peters was very angry because he felt that Mrs Hlophe always used the video machine when he wanted to use it. I had to find out what Mr Peters was unhappy about.

"I had to make sure that I did not take sides. That would be a really big problem. So I suggested that we kept a time sheet and whoever wanted to use the video machine could request it and fill their name in on the time sheet. You can see that I was careful not to take sides without listening to both sides, and we were able to solve the problem. Another time, we had a problem about how the budget was being spent. For this type of conflict I call a meeting of all staff members and we solve the problem as a group.

"There have also been times when I had to call a meeting where student representatives and members of the community who are affected by the Centre were present."



Conflict management is another management task that cannot be ignored. If conflicts are not brought out in the open for discussion, people can stay angry for a long time.

ACTIVITY 7

Sometimes conflicts are never sorted out. In such cases, people could remain angry with one another for very long periods. Have you ever experienced a conflict that was not sorted out?

Some managers say that not all conflicts need to be openly dealt with – some managers decide that it is better to “let sleeping dogs lie”, as the expression goes, rather than bringing conflicts

If you bring disagreements into the open, people can often think of new ways of solving problems. Management can play a role in encouraging this process.

into the open for discussion. But in many cases managers cannot just ignore conflicts. A good and fair manager will know that he or she has to act in some conflicts. If you bring disagreements into the open, people can often think of new ways of solving problems. Management can play a role in encouraging this process.



So, for example, in the situation involving Mr Peters and Mrs Hlophe, Mrs Vilakazi helped each of them to see the problem from the other person's point of view and then encouraged them to reach a decision that was suitable to both of them – even if neither of them was entirely happy with the solution. When a solution is reached, both the people should feel that it takes a bit of each of their views into account.

It is up to the manager to see to it that the staff learn to respect one another. In this way people will be able to solve conflicts in a way which does not threaten their dignity. The manager's task here is to see that this is achieved as far as possible.

When you spend money, you must always think about how relevant this is to the goals of the project.

ACTIVITY 8

Listen to the relevant section on your cassette. We are going back to the conflict between the two people who are having a disagreement about how to use the school hall on 13 February.

Person A wants to use the hall for a puppet show for pre-schoolers. The children are tremendously excited, and are queuing up at the door.

Person B wants to use the hall for the AIDS exhibition, and the adult community members are queuing up at the door on the other side of the hall.

Listen to A and B role play the problem on the cassette. Imagine that you are in Mrs Vilakazi's position. Stop the tape, and think about what you will do to resolve the conflict.

Now play the tape again, and listen to how Mrs Vilakazi handles the problem. On the checklist below, tick the things she does.

Does she:

- find out what fears and worries A and B have?
- understand that each person has a problem?
- understand what the problem is?
- let each person say what the problem is for him/her?
- check that A understands B's problem and vice versa?
- try to get them to solve the problem together?
- encourage them to look for a solution where both get what they need?
- represent both sides, even if she prefers one point of view?
- use caring language?
- discourage name calling?
- ask what the matter is and let each person express their view and their feelings?
- find out what is involved?
- ask for more information?

- identify any areas of agreement so that she can encourage them to move forward?
- find out what kind of solution they would like?
- try to get them to find a solution by stepping into each other's shoes?

You may have to play the tape a few times to see which of these methods Mrs Vilakazi uses. Would you find the checklist useful when trying to solve other conflicts?

3.9. MANAGERS ARE ACCOUNTABLE

When project managers make decisions they have to be able to explain why they decided to do certain things, and they must show that they have listened to the advice and opinions that people have given. They have to account for* the way the resources of the project are being used, and they have to explain if there are any problems.

Mrs Vilakazi is accountable to the staff of the project as well as to the management committee of the project. Let us look at how she explains what being accountable means.

Case study: Being accountable

"This project is monitored and evaluated by a committee. Whenever it meets, I have to report to them about the work of the project. I need to have a written report to refer to when I do this. I write down notes from time to time and keep them in a file so that when the time comes to prepare a report for this meeting, I am well prepared to discuss the achievements of the Centre and to point out to them some of the problems that I feel it is still facing. Of course, I also discuss my ideas on this with the staff, and I must work very closely with Ms Gaduka to make sure that we can account for the money we have spent."

Mrs Vilakazi tell us that she has to write a report about the work of the project for the management committee. Later in this unit, we will look at one of her reports and we will see how she explains to the management committee what kinds of things the project does.

3.9.1. Developing an atmosphere of accountability

Managers develop an atmosphere of accountability by holding discussions and by encouraging the project staff to exercise their own judgement. A project manager has to follow a careful path between expecting the staff to exercise their own judgement and at the same time expecting them to remain accountable to the rest of the staff and the wider community.

It is important that staff members do not feel that they are being controlled by a set of rules that is simply imposed on them. A project can only be successful if it is based on plans that people have discussed. If people work together, they will be able to make plans that they can understand, and then they will not feel as if they have to follow rules that someone is forcing onto them (Flood 1993:119; McKay & Romm 1995; McIntyre 1995:191.)

3.9.2. Managers must consult before they spend the project money

Accounting for how money is spent is a very important task for ABET practitioners who are running projects. Every project has a budget – this is an amount of money that is available to spend in running the project. The question is: who should be responsible for deciding how the budget should be spent? In the end, the project manager will probably have to decide this. But he or she will have to take advice from the bookkeeper. He or she will also be accountable to other members of staff as well as the wider community for how money is spent.

The spending of the project budget needs to be 'accounted for' through a process of discussion involving members of staff and the wider community.

When he or she decides how the budget can be spent, the project manager has to think about whether spending the money will help the project to achieve its goals. As we have seen, setting goals is a process which needs wide discussion. In this process, as in all decision-making, project managers have to consult with other people because it is important to check one's judgements against other people's views.

STUDY SKILLS: Still thinking about essays

Think about your assignment topic.

- Have you prepared an essay plan?
- Have you thought about what you will say in the introduction?
- Will your introduction refer to the topic?
- What points will you need to argue?
- What do you think your conclusion will be?

3.10. LINKING WITH THE WIDER COMMUNITY

Because Mrs Vilakazi knows that the project involves the wider community, she spends time thinking about how to make sure that the project is shaped by the needs of the community. That is why she has asked Mr Peters to make sure that he is always in touch with community needs. She also attends community meetings so that she can get ideas from the community and so that she can tell people in the community about the work of the project. Sometimes she finds that the community has a special need. Last year they wanted voter education classes. Mrs Vilakazi first had to hold a meeting to discuss this request with the staff. In the next case study, she tells us about what happens when she goes to community meetings.

Case study: Staying in touch with the community

"As official project leader I am often invited to meetings in the community. Sometimes the meetings are about other education projects, or meetings of local community groups, and sometimes they are on national education matters. I have to attend meetings to keep in touch with community matters and to add some input from our project into the discussion. But I can't go to all the meetings, so that is why Mr Peters has attending community meetings as one of his tasks."

Management involves the task of bridge-building, both inside the project and with outside structures and projects. When project managers engage in bridge-building with the community, the project has a chance to develop along with the community and not just react to what happens in it. We saw in the previous two units why it is important for projects to be shaped by the community. Good managers must try to think about ways of getting people inside the project to work together and also to try to get different projects in the community to work together. To do this, they need to have good skills for handling personal relationships, and also listening and negotiating skills.

Accountability in a project means that you always think about the concerns of others.

All things considered, Mrs Vilakazi's days are busy! On a day-to-day basis, she tries to allow the various staff members to use their own initiative in tackling issues that arise in their work and even in handling their disagreements and conflicts. But she also tries to be available to offer support and advice if the staff feels that they can benefit from her involvement.

3.11. REPORTING

Part of being accountable means that project managers must report back about what a group or a person has done. There are different kinds of reports, but we will focus here on the annual report.

The chairperson is usually the person who writes the annual report. The annual report should tell us

- what the organisation has done in the past year. It is a summary of all the work in the organisation
- what the organisation planned to do, which plans failed and which plans were successful
- what the organisation plans to do next year

Usually the annual report is read out at the annual general meeting* (AGM) and is sent to other people outside the organisation who fund the project.

We will look at what should go into an annual report, and in the next listening activity, you will be asked to compile a report.



ACTIVITY 9

Listen to the next section of the audio cassette. Using the following as headings, make notes about the following:

1 GENERAL INFORMATION ABOUT THE PROJECT

2 FUND-RAISING

- 2.1 Donors
- 2.2 Other fund-raising activities

3 PROJECTS

- 3.1 Feeding scheme
- 3.2 ABET classes
- 3.3 Street children programme
- 3.4 Voter education
- 3.5 ABET project

4 FUTURE PROJECTS

If you listened to the cassette carefully, you should have been able to fill in a number of points under each of the headings we have given you.

STUDY SKILLS: Heading and sub-headings

The outline we gave you consisted of numbered headings and sub-headings. The sub-headings fit under the bigger or main headings. So, for example, if you look at the main heading PROJECTS, you will see that there are a number of sub-headings that fit underneath it. Look at how we numbered the main heading, PROJECTS, and how we numbered each of the sub-headings under it.

Have you written your report? This is what ours looked like:

THE ANNUAL REPORT OF THE MASISISANE LEARNING CENTRE FOR 2011

1. GENERAL OVERVIEW

During 2011, the Masisisane Learning Centre had a very successful year. Many of the existing projects at the Centre were improved and the Centre started other new projects.

2. FUND-RAISING

During 2011, we had two main ways of raising funds.

2.1. Funding from donors

The Centre received funding from the usual international and local donors. Although these donors continued to fund the Centre, the Centre was still short of money for various outreach projects like the street children project and the voter education programme.

2.2. Fund-raising activities

It was necessary to try other ways of raising funds. The staff at the centre held film evenings twice a month and were able to raise enough money to employ an extra teacher. The learners' committee arranged a cake sale every month and were able to contribute towards buying books for the library and paying a voter educator.

3. PROJECTS

Many of the projects that were started in previous years continued successfully during 2011. The Centre also started two new projects.

3.1. The feeding scheme

This project started in 2009. During 2011, the project grew and was able to provide a nutritious meal for children at seven primary schools in the area. The local clinic reports that there have been fewer cases of malnutrition in the area this year.

3.2. ABET classes

This year we started two new ABET classes – one at the basic literacy level and one at level 3. Apart from preparing learners for the various IEB exams, the project also assisted

the local training centre with teaching numeracy and calculating skills to learners who were hoping to take their building trade tests.

3.3. The street children programme

Because of the increasing problem of street children, a new project was started. The project provided a shelter for street children. The shelter offered children a place where they could get clean clothes and a meal each day. The organisers of the shelter were successful in placing 12 of these children into primary schools in the area. One of the children came third in his class. We at the Centre are pleased with the cooperation of the local school principals.

3.4. Voter education

During 2011, the centre was involved in voter education. This year the Centre was asked to train voter education trainers who could prepare people for the local elections. Twenty-three trainers were trained during a two-day workshop.

3.5. The ABET certificate project

Because the Centre is keen to expand its activities in 2012, it encouraged several members of the community to enrol for the Unisa ABET course. The Centre runs a monthly workshop for learners enrolled for the Unisa course and allows these learners to participate in classes and also to observe the activities at the Centre.

4. FUTURE PROJECTS

In 2012, the Centre would like to form partnerships with the nearby health project and with the industry training project. In this way the skills that have been developed by each of the projects can be shared and the programmes of the various centres can be enhanced.

What did your report look like? Was it similar to ours? Can you see how project reports are a good way of telling people what that project has done? This form of reporting is especially useful for keeping funders informed.

3.12. CONCLUSION

In this unit we looked at ways of directing and coordinating a project. We spoke about the project leader to show that responsibility for coordinating the activity of the project according to the project aims is sometimes given to a specific person or group of persons – the leader or leaders of the project. However, this does not mean that these people can make decisions without other people being involved. Rather, leadership is a process which involves sharing power in the ways that we discussed above. Can you think of any other ways of being a good and fair manager?

We hope that in this unit you learnt things that will be useful to you. In the next unit we will discuss some of the other skills that you may need as an ABET practitioner.

Glossary

Account for	If we have to account for what we do, we have to explain our actions to others to show that we have been doing the right thing. When we work in a project we must give an account or explanation to the project board or to the community, for example.
Air their views	If people air their views, they say what they think, or express their opinion.
Annual general meeting	The annual general meeting or AGM is a meeting which a project or organisation holds once a year to discuss everything it has done in the past year and to plan for the next year. All the interested people (staff members, committee members, donors, community members) are represented at the meeting.
Brainstorming	Brainstorming involves a group of people getting together to try to solve a problem or make plans. Everybody gives their ideas, and when as many ideas as possible have been given, the best ideas are used to solve the problem or to make new plans.
Bridge-building	When two organisations or projects come together to share problems they may have or to make plans, we call this bridge-building.
Clashes	Here clashes refer to situations when two things are happening at the same time on the same day, and maybe in the same place.
Collaborate	Work together to achieve something together. Individual people can collaborate, and so can projects.
Community liaison	This involves making contact with the community and talking to people about their problems and needs.
Coordination	Organisation and alignment. It often refers to organising people and their work. If you are coordinating a project, you try to have everyone know what the others are doing and when things are happening so that you avoid clashes.
Culture of respect	A way of working with one another where respect for fellow workers is the normal practice that everyone follows.
Defensive	When you feel defensive, you feel that you are being attacked and you need to defend or protect yourself.
Empower	To empower people means to give them the power, ability or authority to do something for themselves. It also means helping them to realise that they can also make a contribution to the project.
Enriched	If your understanding of something is enriched, we mean that it is increased or made better because you have learnt something.
Exercise judgement	When you exercise judgement, you think about a problem and decide for yourself what you think about it and how you would solve it.

Feedback	If people give you feedback, they tell you what they think about something or some work you have done, or maybe even about the way you have behaved.
Inspire	If someone inspires you to do something, you want to do it because they have made you excited about doing it.
Let sleeping dogs lie	This expression means to leave a problem alone rather than making it worse by intervening or interfering.
Mediating	Trying to resolve a disagreement, argument or difference of opinion among people or groups by helping both sides find things that they can agree on.
Philosophy	A philosophy is a way of thinking about life and deciding how you will act.
Putting yourself in someone Else's shoes	Trying to understand how another person feels about a problem, why they feel that way, and how they would solve the problem.
Roamed	To roam means to wander around without anywhere specific to go and without anything specific to do, and in this case sometimes do bad things.
Take in	To take in information means to hear or read information without thinking about it carefully and critically.
Take sides	If two people are arguing about something and you take sides, you listen only to one person and think he or she is right.
Up to date	If we are up to date, we know the newest information about what is happening.

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UNIT 4: THE ORGANISED ABET PRACTITIONER

4.1. Introduction

In the previous units we looked at some of the things that practitioners need to do before starting a project. In unit 1 we looked at how the practitioner should try to find out what the needs of a specific community might be. We said that it was important to do this before starting a project so that the project could be shaped to fit these needs. Then in unit 2 we looked how to plan an ABET project. We saw that it was useful to involve the target community in the planning arrangements. In unit 3 we met with Mrs Vilakazi of the Masisisane Learning Centre. She told us about the various things that she has to do to ensure that the project runs smoothly.

Now, in this unit, we will be looking more closely at another important function in the management of projects. You will learn more about the **administration** of projects and you will find answers to questions such as:

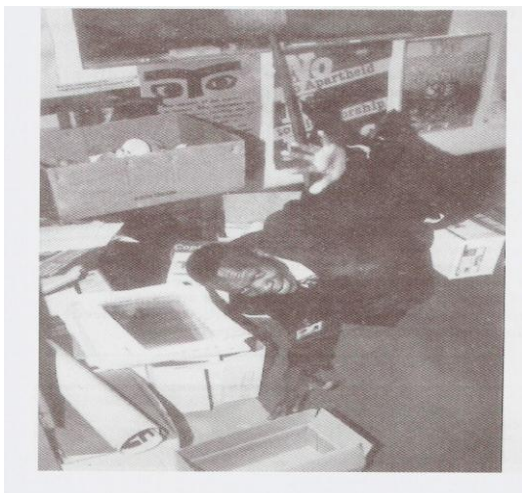
KEY QUESTIONS

1. Why should we keep records of project activities?
2. What kinds of records should we keep?
3. What ways are there of keeping documents safe?
4. How can we give people in an organisation information?
5. What kind of preparation do we need to do before meetings?
6. What kinds of records do we need to keep after meetings?
7. If I apply for a post, what kind of document will I need to submit, and what information should it contain?
8. What can I do to manage project money better?

Before we begin our discussion, look carefully at the photograph below of Thabo Mokoena's office. He recently completed the UNISA ABET course and was appointed as project **administrator** for the ALEX project.



ACTIVITY 1



Look carefully at the photograph of Thabo's office. Now answer questions below. In each case make a tick in the box if you think the answer is yes, or a cross in the box if you think that the answer is no.

- If you asked Thabo for the letter you sent him last week, do you think that he would be able to find it?
- Do you think that he would remember that you took leave last week?
- Do you think that he would know who is teaching a particular class at a particular time on a particular day?
- If the auditor accused Thabo of stealing money, would he be able to show that he has not done so?
- Would he know which learners have paid their fees?
- Would Thabo be able to tell you what decisions were made at a meeting held in May last year?

We put crosses in all the boxes because we do not think that Thabo would be able to do any of those things. You might have very good reasons for disagreeing with us, but judging from what we can see of Thabo's administrative system, we do not think that it is very efficient. We think that a good administrative system is the heart of a good organization and so in the rest of the unit we will talk about administration systems and the role of a project administrator. Without a good administration system, any project is bound to run into lots of difficulties. All projects need a good system for:

- filing
- keeping staff and learner records
- keeping financial records
- keeping records of meetings

4.2. A CLOSER LOOK AT RECORD KEEPING

Before we discuss these aspects of record keeping, we will once more visit our fictitious character Thabo in his new job as project administrator.

Case study: Thabo's new job

We arrive at Thabo's new office. On his door is his name:

Thabo Mokoena
Project Administrator

We knock a few times but there is no reply. As we are about to turn away we hear a loud crash and then a muffled voice calls "Come in!" We open the office door and see Thabo lying on the floor half buried under cardboard boxes. He tells us that he tripped over one of the boxes as he was trying to get to the door. He lies on the floor stunned for a few seconds, but then he gets up, brushes the dust off his clothes and gives us a wide grin.

We have not seen Thabo for a long time. He tells us about his new post as project administrator. "One of the things I must do," he says, "is to keep all these documents in some kind of order. And I am also supposed to control the money side of the project and to answer all the letters."

"But," he tells us, "there are so many papers and people keep asking for things, so I just don't know where to find anything anymore. Every day I get letters, accounts, advertisements for new materials, new documents about ABET policy, examination information, receipts and so on. I also get letters and CVs from people looking for a job at the Centre."

'I need to develop a system of keeping things in a safe place. I also have to tell everyone when we are having meetings. Sometimes I have to spend the whole day running around looking for people so that I can give them the information that I am supposed to.' We then chat to him about the aims of the ALEX project and about the planning arrangements for the project. He says that he will show us the project proposal.

"Now let me think, where did I see it last? Oh yes," he says and ducks under his desk. As he finds the project proposal, he straightens up and knocks his head.

Once again Thabo is stunned and lying on the floor between the boxes.

Even though this case study is fictitious, we can learn a lot from Thabo's experiences, particularly about how important a good administrative system is. And a good filing system is a vital part of a good administrative system.

4.3. Filing documents

Thabo tells us about many documents that he has to keep. He says that he never knows where to find them.



ACTIVITY 2

Look at the case study again and make a list of the different kinds of documents that Thabo should file.

- While you are compiling this list, think about what kinds of documents you may need to file in your own organisation.
- If you are not involved in an organisation try to speak to people who are involved in administrative jobs (someone in your study group might have this kind of job) about how they do their filing.

Thabo has to file:

- Letters
- Accounts
- new course documents
- ABET policy documents
- examination information
- receipts
- staff leave forms

- a) If we were to design a filing system for Thabo, what would start by identifying the kinds of documents that Thabo needs to file. The fact that Thabo knows what kinds of documents that he receives regularly is a useful start. He could open a file (or if he has many documents he could open more than one file) for each type of document on the list. In that way, it would be easy for Thabo to retrieve or *find* a document, such as a letter or a staff leave form, if he needs to.

4.3.1. Different types of filing systems

There are many different ways of keeping important documents. In this module, we will not look at some of the more expensive electronic ways that require a computer. You would probably not use these methods in a small or medium-sized project. Instead we will focus on the less expensive ways.

Card files

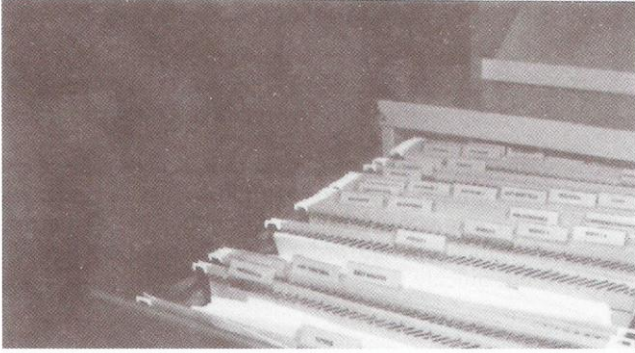
Thabo could use cards to keep track of the registered learners or for keeping a record of who has borrowed a particular library book. Some organisations use card files to keep a record of whether or not learners have paid their fees.

These cards can be stored in a box, arranged in alphabetical order according to learners' surnames.. It would then be quite easy to find information about a particular learner. Let's say for example that you needed information about John Mabunda. You would look for the card among the cards for learners whose surnames start with M. Example of an enrolment card.

ENROLMENT CARD
NAME
ADDRESS
NAME OF CLASS FRIEND
PLACE OF WORK
TEL NUMBER
DATE OF ENROLMENT
PLACEMENT INTO GROUP

If you keep cards containing information about companies that supplied books or furniture for the project, you could file them in a box like this too so that you can find the information you need quickly.

Hanging files



(Hanging file folders in a filing cabinet) [If you have not seen this kind of filing cabinet before, ask a friend or family member to

help you read this photograph]

If Thabo had a filing cabinet with drawers, he could use hanging file folders. The photograph above shows the open drawer of a filing cabinet full of hanging file folders – each folder has four hooks that slide over a rail. He could open a file or a few files for each of the types of documents he says he has problems keeping track of. He could have one for accounts and one for letters and so on. These kinds of files can also be arranged in alphabetical order – you can see that the hanging file folders in the photograph have been labelled.

Vertical filing

This is very similar to using hanging folders files. The folders are kept in the drawer of a filing cabinet, but although they are stored vertically (in other words, not piled up on top of each other, but arranged upright from the front to the back of the drawer in the filing cabinet), the folders do not hang from the rails as they do in a hanging file cabinet. Thabo could open one file for each kind of documents referred to in the case study and the documents could be filed either in alphabetical order or according to date.

Arranging documents in each file

Depending on the contents of the documents, you could arrange them in any one of the following ways:

- *Alphabetically* according to the names of companies or individuals. If you are using the names of people, you should arrange the documents according to the first letter of their surname, not their first name.
- *Numerically* by giving each type of document a number and then filing the documents in 'number' order. Because numbers are difficult to remember, if you use a numerical filing system you will find it useful to compile a list of names and numbers to help you find the document you are looking for quickly.
- By subject. Subject files are useful for filing documents about specific subjects. For example, if you look back at the case study, you will see that Thabo speaks about getting lots of documents about ABET policy, ABET exams and so on. He could open a file for each of these subjects.
- *In chronological (or date order)*. Chronological filing means arranging documents according to dates. This would be a good way of filing accounts or policy documents.

Sometimes it is a good idea to combine two or more ways of filing. For example, when you are filing policy documents you could put these into one subject file, but you could also arrange the documents in date order so that you will be able to find the latest ones quickly.



ACTIVITY 3

Now look at the dates on the documents and arrange them in date (or chronological) order. Remember that when you arrange documents in date order, you should place documents with the latest date in front or on top. It may help you to cut out the documents to do this activity. If you cut them out, you could also arrange the documents in alphabetical order.

4.4. COMMUNICATING WITHOUT RUNNING AROUND

One of the problems that Thabo mentions is that he spends a lot of time “running around” to find the staff at the learning centre so that he can give them messages and other information.

ACTIVITY 4



Think about or discuss with your study group some things that Thabo could do to avoid having to run around.

What ways can you think of that will save him having to run to everyone to give them information?

What can he do with the information so that people will get their messages?

We thought of a few things that he could try:

- He could send a memorandum* to various staff members.
- He could have a basket or a pigeon hole* for each staff member and leave messages for them there.
- He could put the information up on the notice board.
- If he worked in a large organisation, he could publish news or information in an internal newspaper.

We use memos for internal communication.

Let's take a closer look at some of these suggestions.

4.4.1. Sending a memo

Most organisations have a system where staff receive information or are reminded about things by memorandum (people often use the short form of this long word, and speak about a memo or memos). Memos are written communications or reminders. We do not use memos for sending information outside the organisation. They are used when staff members want to communicate with one another inside the organisation. One of the most common ways of distributing memos is to place them in the staff members' pigeon holes.

There is a special format for memos. Look at the following example:

MEMO	
To:	Mrs Vilakazi
From:	Dora Shabalala
Date:	15 September 2012
Subject:	Class outing
<p>I will be taking the level 2 class on an outing on 1 October 2012. I have arranged to take the class to the Central Post Office. We will leave by taxi at 12h00 and will return at 15h00.</p>	
<p>DS</p>	

All memos must give the following information:

- who they are addressed to
- who they are from
- the date
- the subject (a very brief summary of what they are about)
- the message
- and at the end, the sender's initials

Usually organisations have ready printed* memo forms to make things easier for their staff.



ACTIVITY 5

*You know what information must be included in a memo. Now try to write a memo yourself. Address it to **Mrs Vilakazi** and tell her that you will be taking your class to carry out a clean-up project on **1 October 2012**. You need to give her all the details.*

Please do not look at our memo until you have completed your own.

Here is our memo.

To: Mrs Vilakazi
 From: Dora Shabalala
 Date: 20 September 2012
 Subject: Class clean-up project

I will be taking the level 2 class out as part of a clean-up project on 1 October 2012. We have identified the section of river bank nearest the Centre as needing attention. No transport is necessary, as the group will be able to walk there and back. We will leave the Centre at 14:00 and return at 16:00. I have ordered bags and protective gloves for the class. The group will place the litter they collect in black bags, and bring these back to the Centre. Mr Radebe has agreed to collect the bags from the Centre at 17:00 on the same day.

DS

Did your memo include the information that ours did? Do you agree that writing a memo is a good way to give information? If Thabo used a memo system, he would not have to run around looking for staff members. He would just have to write a memo and put it into the relevant* staff member's pigeon hole. In this way, Thabo could get messages to the staff even if they are not at work. They could collect their messages when they come in. Staff members can use this method to communicate with one another too. They can leave memos and messages in other staff members' pigeon holes. But Thabo will need to encourage the staff to check their pigeon holes regularly.

STUDY SKILLS: Does your sentence say what it has to say?

When you write a memo, you need to say what you mean very clearly. Your sentences need to be brief and to the point. In essay writing, the same rule applies. Each sentence must say what you mean. You may find it useful to read each sentence aloud. If you read each sentence by itself (from one full stop to the next) you will often be able to hear where something is missing or where there are mistakes.

4.4.2. Putting information on the notice board

Putting information on a notice board is also a good way of giving information to other staff members. You will find notice boards useful for telling staff about meetings, and giving them new information, details about events such as the end-of-year graduation ceremony, and so on. If Thabo had thought of putting information on the notice board, he would have managed to get the information to the staff without having to run around looking for everyone.

One of the problems of using a notice board is that you may forget to remove old notices. If you do not remove old notices the staff will not see when you put up new information.

4.4.3. Taking a telephone message

In our case study Thabo tells us that he also spends a lot of time running around looking for people so that he can pass on telephone messages that callers leave for them. Once again, he could avoid all this running around if he took messages effectively and put them into the staff members' pigeon holes. A good way of taking messages would be for Thabo to make or buy forms like the one below, so that he just needs to fill in the necessary information and then leave the form in the person's pigeon hole.

4.4.4. Giving information in meetings

Meetings are also a good way to give staff information that they will need. There are different kinds of meetings. Some meetings are **informal**, and can be held whenever you need to discuss urgent matters. Other meetings are more **formal**. Formal meetings must follow a set of rules and must be controlled by a chairperson. There are specific documents that have to be kept for a meeting. Let's look at these more closely.

Notices of meetings and agendas

Let's do an activity first.



ACTIVITY 6

You have to arrange a meeting. Before you can get people to attend the meeting, you will need to give them certain information. Think about all the information you would need to give the people who are going to attend so that they will all arrive at the same place at the same time and so that they will all know what is to be discussed.

Agendas tell us
what is to be
discussed at
meetings.

Have you completed your list? In our list, we included the following:

- when the meeting is to be held
- where the meeting is to be held
- what will be discussed at the meeting

In order to tell people when and where the meeting is to be held, you would need to send out a notice of the meeting.³ You could also include an agenda, which is a list of what you will discuss at the meeting.

³ We will not be discussing formal meetings in detail here. Formal meetings have to follow special rules.

We are going to give you an example of a notice of a meeting that includes an agenda.



ACTIVITY 7

Below we have given you an example of a combined notice and agenda for the monthly meeting of the ALEX Adult Education project. Read the notice and agenda carefully and see whether you can answer the following questions:

- *When is the meeting to be held?*
- *Where is the meeting to be held?*
- *At what time is the meeting to be held?*
- *What will be discussed at the meeting?*

If Thabo put a notice and agenda on the notice board or in the pigeon holes of the various staff members, he would be able to inform staff members of meetings and what was to be discussed at them, and he would save himself a lot of work at the same time!

MONTHLY MEETING OF THE ALEX ADULT
EDUCATION PROJECT

Date of meeting: 1 September 2012

Time of meeting: 18h00

Venue: Room 42 at Alexander High School

Agenda

1. Opening and welcome
2. Attendance and apologies
3. Minutes of the previous meeting

4. Need to see whether project is successful

- How can we evaluate the Alex project?
- When can we do the evaluation
- Who will do the evaluation?

5. Arrangements for the year end function.

6. Closing

4.4.4.1 Minutes of meetings

When we showed you the picture of Thabo's office, we asked you whether you thought that Thabo would remember what decisions were made at a meeting held in May last year. In order to remember this information, Thabo would need to have kept a record of all the decisions that were made at that meeting. We call these kinds of records **minutes of the meeting**. What are minutes of a meeting? They

- are brief notes of all the decisions that were taken at the meeting
- tell us who attended the meeting
- tell us what time the meeting began and ended
- tell us who wrote the notes or minutes
- tell us when and where the meeting was held

In the next activity you will get some practice in writing the minutes of a meeting.

ACTIVITY 9



Listen to activity 9 on the cassette. You will hear a recording of the monthly meeting of the ALEX adult education project.

You have already seen the notice and agenda for this meeting – turn back to activity 8 if you need to refresh your memory.

Minutes of meetings are important records.

- You will need to listen to the tape and make notes of what was discussed at the meeting.
- You will need to use the agenda appearing on the previous page as your guide for headings.

You will need to write brief notes on the following:

- 1 The opening
- 2 Who attended the meeting and/or who was absent
- 3 Were the minutes of the last meeting accepted?
- 4 The planning for the evaluation of the ALEX project
- 5 The arrangements for the Christmas party
- 6 What time the meeting ended

Now listen to the tape and write brief notes on each of these aspects.

THE ALEX ADULT EDUCATION PROJECT

Minutes of the monthly meeting of the ALEX Adult Education project held in room 23 of the Gauteng High School on Monday 23 October 1995 at 18h00.

1. Opening and welcome

Mrs Mogase welcomed everyone to the meeting.

2. Apologies

Ms Molefe, Mrs Shabalala and Mr Mabusa

3. Minutes of the previous meeting

Minutes of the meeting held on 22 September 1995 were read and signed as correct.

We have given you a copy of the minutes that we took to compare with yours. Did you record the most important decisions that were made? If you did not, look at our example while listening to the tape again.

Did you manage to write down all the decisions that were made during the taped meeting? If you did not, look carefully at our minutes and then try to do the activity again. We have given you a checklist so that you can see whether your minutes were complete. Do the minutes that you took tell you

- who was **not** at the meeting (the apologies)?
- **when** and **where** the meeting was held?
- whether the minutes of the previous meeting were **correct**?
- when the **last** meeting was held?
- who **opened** the meeting?
- what time the meeting **ended**?
- what the **main decisions** made at the meeting were?
- **where** and **when** the Christmas party will be held?
- **how much** each staff member must pay to attend the party?
- **why** the ALEX project needs to do an evaluation?
- **what** they will evaluate?
- **who** will do the evaluation?

4.5. WRITING A CV

If you look back at the case study, you will see that Thabo says he receives many CVs from people looking for work. In this section we will look at what a CV is and what you should include in one if you are applying for a job.

Most of you will have heard people speak about a CV. This is short for the Latin term *curriculum vitae*. A CV is a summary of a person's education, work experience and professional qualifications. Most people submit a CV when they are looking for employment. Sometimes people also submit a CV if they are applying for a bursary. CVs contain special information that you would like a potential employer to know about you. If you are looking for employment, the employer will first look at your CV before deciding whether to ask you to come for an interview. So you can see that a CV is a very important document, and it needs to be well written.

Let's have a look at the kind of information anyone should include in their CV.

A CV tells people about your personal details like education, employment and special abilities.

As an example, here is Thabo Mokoena's CV.

CURRICULUM VITAE

PERSONAL DETAILS

SURNAME : Mokoena
 FIRST NAME : Thabo
 DATE OF BIRTH : 1963.10.08
 MARITAL STATUS : Single
 HOME ADDRESS : 333 Lekaneng Extension
 TEMBISA 1628
 POSTAL ADDRESS: ALEX Centre for Social Development
 PO Box 1952
 ALEXANDRA
 1201
 TELEPHONE : (012) 429 6301 (Home)
 (Please leave message with my father Mr S Mokoena.)
 (011) 904 1234 (Work)
 DRIVER'S LICENCE : Code 08

EDUCATION

1995 : Studying for the ABET certificate course at UNISA.
 Currently registered for the following modules:
 Contextual Studies
 Adult Learning
 Managing Projects
 Teaching Literacy and Small Business Development

1986 – 1988 : Did various short courses: Public Relations, Word Perfect,
 and a one week clerical course.

1982 – 1984 : Studied Computer Science at University of the North. Did
 not complete the degree.

1975 – 1981 : Attended Tembisa High School. Matriculated in 1981.
 Passed the following subjects:
 English
 Northern Sotho
 Afrikaans
 Maths
 Science
 Accountancy

WORK EXPERIENCE

- 1995 : Presently employed as project administrator at the ALEX Centre For Social Development in Alexandra. My duties include:
- project administration
 - convening meetings
 - managing finances
 - doing a needs analysis
- 1993 – 1994 : Was employed as a computer teacher at the ALEX Centre for Social Development. Was also involved in the Centre's evaluation.
- 1986 – 1993 : Did various part-time/casual jobs in Pretoria.
- 1984 – 1986 : Was employed as a cashier and filing clerk at the Meal Milling company in Pretoria (was retrenched).

INTERESTS

Watching football, reading and singing in the church choir.

REFERENCES

Mrs E Mogase
 Director of the ALEX Centre for Social Development
 PO Box 1952
 ALEXANDRA
 1201
 TEL (011) 904 1234

Mr A Mokotong
 Human Resources Manager
 Meal Milling
 PO Box 1234
 PRETORIA
 0001
 TEL (012) 345 123

Would you be able to write up a CV for yourself? Look carefully at Thabo's CV and see if you can fill in information about yourself under the kinds of headings that he used.

ACTIVITY 10

If you do not already have a CV, why not start working on one? When you have written it up, ask one or two friends to read it to see that you have not left anything out and to check that you have spelt everything correctly.

You may find it useful to take your CV to your next study group and to compare it with the CVs of one or two other group members. You could also ask your tutor to assist with any problem that you may have with your CV.

When you have done this, you could ask someone who is good at typing to type your CV for you so that it looks professional.

When you complete your ABET course, you may find it very useful to have a completed CV so that you can begin to look for an ABET post.

STUDY SKILLS: The steps of essay writing

If you think about what we asked you to do to complete your CV, you will see that even though a CV is not an essay, when you prepared your CV you applied most of the important steps of essay writing.

These are:

Gathering material: For a CV you would have looked for your certificates and addresses of referees, thought about your previous jobs and so on.

Generating ideas: You then needed to get your ideas onto paper. This meant that you needed to quickly jot down your thoughts.

Planning: We helped you with your planning when we gave you the headings to copy from Thabo's CV.

Preparing a first draft: We asked you to write up a first draft. To do this you needed to write down all the ideas. The plan or the headings of a CV were there to help you to organise your ideas.

Reviewing: We then suggested that you give your CV to a friend or a member of your study group so that you could get your work edited. After the editing, you got your work ready for a typist.

Final draft: You should take your revised CV to a good typist who will type your final draft. When the CV is being typed, make sure that the typist pays attention to general neatness and presentation. This is what you should do with every essay – except that you do not need to have the final draft typed.

4.6. DEALING WITH MONEY

We saw in the case study that Thabo is expected to manage quite a lot of money for the ALEX project. The project receives money from donors, and he has to see that the money is controlled and that it is spent properly. Thabo says that in the beginning he had problems managing the finances of the project, but that he has now worked out a good system. Here is what he says.

Case study: Thabo's accounting system

We get some money from the funding organisations. We have a budget* that tells us how the money will be spent. The ALEX committee decides on the monthly budget, which looks something like this:

Rent	R 500, 00
Salaries	R2 000, 00
Materials	R 200, 00
Telephone and postage	R 150, 00
Additional expenses	R 100, 00

TOTAL MONTHLY EXPENDITURE* R2 950, 00

Thabo says that the project gets R2 850,00 per month from donors and that they have to collect the rest of the money in the form of learner fees. He says that not all learners can afford to pay their fees, and so some months the project runs short* of money. However, the project is usually able to collect about R100,00 in learner fees, which brings the monthly income* to R2 950,00. If the project does not collect what is needed in fees, the staff try to hold a cake sale to help them to get the balance*.

All projects must account for how money is spent.

Thabo tells us that he used to have problems remembering who he has paid and also who has given money to him, but now he has a system that works.

ACTIVITY 11



Read the case study carefully and then answer the following questions:

- 1 How much does the ALEX project spend on rent each month?*
- 2 How much does the ALEX project spend on salaries each month?*
- 3 What is the total monthly expenditure of the project?*
- 4 What is the total income that the ALEX project receives from donors?*
- 5 How much should Thabo try to get from learner fees so that the project breaks even*?*

The correct answers are:

1	=	R 500,00
2	=	R2 000,00
3	=	R2 950,00
4	=	R2 850,00
5	=	R 100,00

4.6.1. Keeping financial records



ACTIVITY 12

In the case study, Thabo says he struggled to manage the finances. Look back at the case study and write down the kinds of problems that Thabo said he had with managing the finances.

Thabo had the following kinds of financial management problems:

- knowing who had paid him
- knowing whether he had paid other people

Thabo does not need to be too concerned about the actual accounting side of the project because the project has an auditor and an accountant*. What he must do is to keep all the evidence of what money he has paid and why he has paid it. He must also keep a record of which learners have paid their fees.

Some of the important documents that he should keep are:

Receipts

Whenever Thabo makes a payment, he must ask for a receipt or keep the cash slip* from the shop. In this way he will know how much he spent and what the money was used for.


DATE <u>21. 9. 1995</u>			
RECEIVED FROM			
<u>Sipho Twala</u>			
AMOUNT IN WORDS			
<u>Ten Rand and</u>	R c		
<u>fifty cents</u>	<table border="1"><tr><td>10</td><td>50</td></tr></table>	10	50
10	50		
With thanks	<u>T. Mokoena</u>		

Thabo must remember to write on the back of the receipt what he did with the money. He must do the same with the cash slips that he gets from any shop where he buys things for the project.

Keeping record of fee payments

One of the ways of keeping records like this is to make a list of who the learners are and then to indicate on the list who has paid their fees for each month. Here is an example of a list of this kind.

THE ALEX CENTRE FOR SOCIAL DEVELOPMENT



CLASS: Level 2 **TEACHER:** Mrs Hlophe

NAME	Jan	Feb	Mar	Apr	May	June	July
Khota, Petrus	5,00	5,00	—	5,00	4,50		
Mabunda, John	5,00	4,00	5,00	5,00	5,00		
Makhanya, Mandla	5,00	4,50	5,00	—	—		
Masuku, Peter	5,00	—	—	—	—		
Ndlovu, Mzimkhulu	5,00	5,00	5,00	5,00	—		
Nzimande, Mary	4,00	5,00	5,00	4,50	4,00		
Shongwe, Florence	3,00	3,00	4,00	—	2,50		
Sibiya, Nomonde	5,00	5,00	5,00	5,00	5,00		
Zulu, Joseph	5,00	—	5,00	5,00	5,00		
Twala, Siphoh	—	—	—	5,00	5,00		
TOTAL	42,00	31,50	34,00	34,50	31,00		

A document like this gives Mrs Hlophe a record of who has and who has not paid their fees each month. It is important to record what money is received from whom, and also to keep a record of what money is paid by the organisation. So you can see that it is important for organisations to keep records like this and to give receipts when they accept money.

4.7. A money management system

Thabo says that he has developed a system that helps him to keep track of the project's finances.

ACTIVITY 13



Look at the money management form below carefully. Then re-read the case study on Thabo's accounting system. Write the information in the correct blocks in the money management form for January. Use a pencil.

After that, use a calculator to work out $A + B - C - D$, or do this calculation the old fashioned way, by working it out on a piece of paper. Write your answer in block **E**. Look at the amount in block **E** and say whether the project made a profit or a loss, or broke even.

This is a good exercise for you to discuss with other learners in your study group. If you find it difficult to complete this money management form, ask your tutor to help you. After you have completed the activity, you can look at our answers.

THE PLUS-MINUS MONEY MANAGEMENT SYSTEM FOR JANUARY⁴

The ALEX Centre for Social Development

THE PLUS-MINUS MONEY MANAGEMENT FOR JANUARY⁴ A

Thabo received R2 850,00 from donors and he had R10 left over from last month. Write the total amount in here

Fees received from the various classes this month

DATE	CLASS	R	c
		+	
		+	
		+	
		+	
		+	
		+	
		+	
		+	
		+	
TOTAL		=	

R	c

B	

Write in the total amount of money you received from class fees here.

Payments made for books and materials

DATE	WHAT WAS BOUGHT	R	c
		+	
		+	
		+	
		+	
TOTAL		=	

C	

Write in the total amount spent on books and materials here.

Other expenses: rent, wages, phone etc

DATE	WHAT FOR	R	c
		+	
		+	
		+	
		+	
TOTAL		=	

D	

Write in the total amount spent on other items here

E	

⁴ The expertise of Prof G Lemmer of the Department of Mathematics at Unisa is gratefully acknowledged.

- In block **A** we wrote R2 860,00.
- Fees collected from learners = R100,00, so we wrote R100,00 in block **B**.
- R200,00 was spent on materials and so we filled in R200,00 in block **C**.
- We included the following under other expenses:

Telephone and postage	R150,00
Rent	R500,00
Additional expenses	R100,00
Salaries	R2000,00
So we filled in	R2 750,00 in block D .

When we worked out $A + B - C - D$ we got R10,00, which we wrote in block **E**. This tells us that the project showed a R10,00 profit in January.

4.8. CONCLUSION

Let's look at what you have learnt in this unit.

Review the key questions at the beginning of the unit and see whether you can answer them. Do you see why it is important for projects to keep records? We looked at the different kinds of records that projects need to keep and at different ways of keeping these documents safely. Can you remember the different ways of giving information to other members of staff in the organisation? Some of the ways we thought about were:

- using the notice board
- writing memos
- placing messages in staff members' pigeon holes
- taking telephone messages
- holding meetings

Can you remember what we said about each of these?

We also looked at ways of informing people about when and where meetings are to be held. We said that a notice of a meeting should be used to give this information. We also looked at how we could tell people what would be discussed at a meeting. Finally, in the section on meetings, you listened to an audio cassette of a meeting and then wrote up a set of minutes for the meeting.

In section 5, we discussed why it is important to have a CV, and you saw how to compile a CV that you could submit if you were applying for a post.

Finally, we looked at ways of recording whether learners have paid their fees and at ways of managing the project money better.

Tick off each of the things that you can now do after studying this unit.

- alphabetical filing
- chronological filing
- subject filing
- take a telephone message
- know different ways of communicating within an organisation
- write a memo
- write an agenda
- write a notice for a meeting
- write a CV
- record money received
- compile a monthly money record
- (anything else)

We hope that you ticked all the boxes!

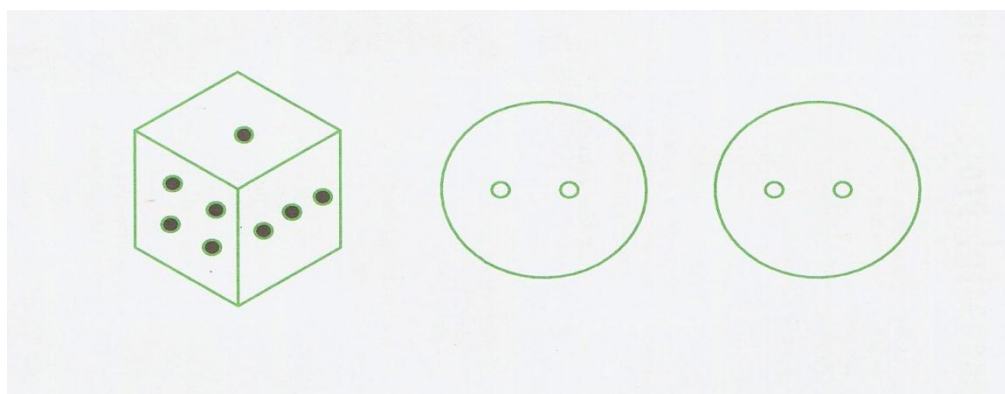


A LAST ACTIVITY

We made this game up to help you revise units 1 to 4. As you play it, think of games that you can play with your classes to help them in their learning.

WHAT YOU NEED

One die and a some coins or buttons (one for each player) to act as markers.



All players start at number 1, and take turns to play. If it is your turn to play, for instance, you throw the die, and move your marker along the numbered circles or squares on the board according to the number you have thrown – if you throw a three, for example, you will move

three places along, and place your marker on the circle or square. If you place your marker on a square, you must carry out the instructions that appear in that square. The first player to land on "FINISH" is the winner.

Play your way to successful project management!

*Please delete the text **below** that reads* "Start at number 1. Move along the numbers according to the number you throw on the die. Carry out the instructions on the square that you land on. The first one to land on 'finish' is the winner. **Play your way to successful project management**"

7 – *change* chiefs *to* traditional leaders

19 – *change* dice *to* die

31 – *change to read* Communities are all the same, so you can do the same kind of project in all communities. **Go back to 19.**

59 – *change to read* You have excellent records about your learners

53 – *change to read* One of the teachers is constantly drunk. *Change* Miss a turn and read the anecdote in unit 5 *to read* Miss a turn.

52 – *change to read* In your annual report, you lie about what the project has done.

63 – *change* co-ordinating *to* coordinating

67 – *change* industry based-project *to* industry-based project

69 – *change* decision making *to* decision making. *Also change* A difficult manager I see *to* **A difficult manager, I see.**

77 – *change* last 11 years *to* past 11 years

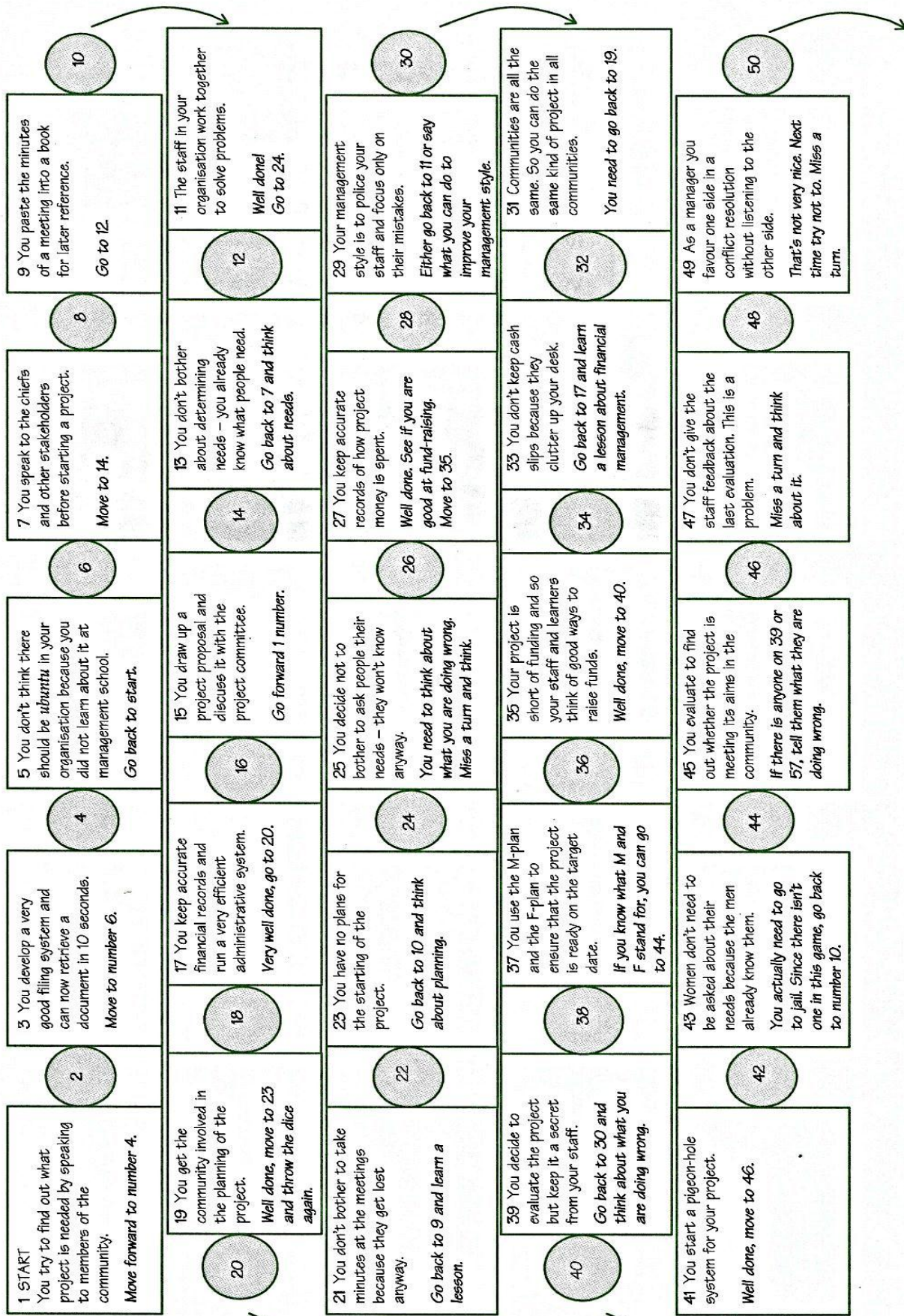
71 – *delete* You probably have a bad project.

83 – *change* want to change the project goals so you fire them *to* want to change the project goals, so you fire them.

87 – *change* a cafeteria so you open a *to* a cafeteria, so you open

Start at number 1. Move along the numbers according to the number you throw on the die. Carry out the instructions on the square that you land on. The first one to land on 'finish' is the winner.

Play your way to successful project management





Glossary

Accountant	An accountant is a person who is specially trained to keep all the financial records of an organisation. One of these jobs is to see that the organisation does not spend more money than it has.
Administration	Administration is all the jobs (such as filing and writing letters) that have to be done so that a project is properly organised and runs smoothly without any problems.
Administrative system	This is the system that the administrator uses to arrange everything for a project and to make sure that there are no problems. The filing system and the system for managing money are both part of the administrative system.
Auditor	An auditor is an accountant who is appointed to check all the accounts of a project. The auditor has to do this to see that the project's money is not being wasted.
Balance	In this unit, the balance is the rest of the money that the project still needs after it has used the money from its donors and the learners' fees to pay for things.
Break even	When we say that a project breaks even, we mean that it has enough money to pay its debts, but it does not have any left over to make a profit.
Budget	A budget is a record of how much money a project has and how much money it can afford to spend on different things.
Cash slip	When you pay for something at the shop, the person at the till gives you a cash slip to show what you have bought, how much money you paid and how much change you must get.
Expenditure	Expenditure is the amount of money we spend on different things. The monthly expenditure of a project is the amount of money it spends every month on things like staff salaries, books, the telephone account and rent.
Income	In this unit, income is all the money that a project receives from donors, learners' fees, cake sales and so on.
Keep track	When we say that Thabo could use cards to keep track of the learners, we mean that he could write down all their information on the cards so that he knows their names and addresses, what courses they are doing, whether they have paid their fees and so on.
Memorandum (memo)	A memorandum is a letter that contains information that the people who are working for a project or inside an organisation need to know. Memorandums are sent only to people who work for the project or organisation, not to people outside the organisation or project.
Monthly income	A project's monthly income is the money it receives every month from its donors, learners' fees and so on.

Muffled	If a noise or sound is muffled, we cannot hear it very well because something is stopping it from being loud or clear.
Pigeon holes	Pigeon holes are rows of boxes with people's names on them. We leave messages or post for people in their pigeon holes.
Ready printed	A ready printed form has some things printed on it and space for you to fill in other information. Examples of ready printed forms are voter registration forms, forms to apply for a telephone and forms to open a bank account.
Relevant	If we say that we must send a memo to the relevant staff member, we mean that we must send it to the specific person the memo is intended for. The relevant staff member is the person who must get the memo.
Retrieve	If we retrieve something, we take it from the place where we (or someone else) put it.
Runs short	If a project runs short of money, it does not have enough money to pay for all the things that it needs to buy or to pay for.
Stunned	If you fall or if something falls on you and you are stunned, you cannot think properly and you feel shaky when you stand up.
To the point	If you write something that is to the point, what you write is exact and clear.

References

Bell, S & Marais, T. 1989. *Communication for managers and secretaries*. Johannesburg: Southern.

Hendry, J, Gardyne, H & Burger, S. 1994. *English in context: Book 5*. Cape Town: Maskew Miller Longman.

UNIT 5: HOW DO YOU KNOW WHETHER A PROJECT IS FUNCTIONING WELL?

5.1. INTRODUCTION

In the previous units we looked at ways of finding out what the needs of a community are and what kinds of management and administrative skills we need to ensure that projects run smoothly. As an adult educator, you will probably be employed by an organisation or project that offers adult education classes. Once the project is actually running, you will probably ask yourself: "I wonder if everything is going according to plan?" Thinking about projects and trying to find out whether they are successful or not is called **evaluation**.

In this unit we will be looking at ways of finding out how well (or how badly) a project is going. We will be trying to answer questions such as the ones below.

KEY QUESTIONS

- 1 How do we know whether a project is running according to plan?
- 2 Why do we need to know whether a project is successful?
- 3 What do we look at to find out whether a project is successful?
- 4 How do we evaluate* projects?
- 5 What do we do with the information that we get from an evaluation?

5.2. THINKING ABOUT EVALUATION

In order to answer these questions, we will once again be "visiting" an adult education centre. This time we will meet Mrs Mogase of the ALEX Centre for Social Development, an adult learning centre in Alexandra Township, which is just north of Johannesburg. We arrive at the centre just as Mrs Mogase, the project manager, is thinking about how the ALEX project is doing.

Case study: I wonder how things are going?

Mrs Mogase is the principal of the ALEX Centre for Social Development in Alexandra Township. The centre has been running for two years now. It offers courses in adult literacy, numeracy, small business management, environmental education, primary health care, and development. The centre is run on money donated by a number of funding agencies and fees that the students pay.

Walking around the centre, Mrs Mogase looks proudly at all the classes (and not so proudly at a few people who were coming late to class) and thinks: "I wonder how things are going? Maybe it's time to see how well the centre has done over the past two years. We need to look at whether we have achieved our aims, and whether we have adequate facilities."

It would be interesting to find out what the students think of the course, the study material, the teaching and the administration. She says to herself: "It would be nice to compare the quality of our work with that of other similar centres. I'm sure we're as good as, if not better than, Mrs Vilakazi's centre."

We can see from the case study that Mrs Mogase is thinking about how the ALEX project is doing. To answer the questions she is asking herself, she will have to start a long process of investigation.



ACTIVITY 1

When Mrs Mogase starts wondering whether things are going well at the ALEX centre, she thinks about various things that she needs to look at. Re-read the case study carefully and underline all the different things that she wants to check on.

We underlined the following things:

- the courses
- the aims of the centre
- the facilities
- the course material
- the teaching
- the administration
- how the centre compares with other centres

If you are involved in a project, you will probably also think about things like this at some stage. In fact, we (your ABET lecturers) often think about things like this. We wonder whether you, the learners, find the material helpful and interesting, and whether you find our tutor sessions of value. We also wonder what kind of a difference you and the rest of our ABET learners will make in South Africa.

If you needed to find out how well things were going, what would you do? What should Mrs Mogase do? What do we mean when we say that we want to evaluate a project?

One of the first things you need to do when you plan to do an evaluation is to inform the staff and the learners at your centre. As you will see in the next part of the case study, people are not always so happy to find out about evaluations. This is what happened at the ALEX centre.

Case study: What should I do now?

Mrs Mogase put notices of the next meeting into her staff's pigeon holes. On the agenda, she included the following list of questions:

- Do we need to do an evaluation?
- What will we evaluate?
- How will we go about it?
- What will we do with the results?

Suddenly, there is a lot of discussion in the passages as teachers and learners talk about the evaluation. Some teachers are scared that Mrs Mogase wants to do an evaluation to find out who is not doing their job properly.

“If she finds this out,” they say, “she will punish us.” “We might be helping the boss find a reason to fire us,” says Mr Moloji anxiously to others in the tearoom. Poor Mr Moloji is so nervous that his hands are shaking and he spills his tea all over his shirt!

The administration staff are very worried about the evaluation. Even the learners are frightened by the idea of an evaluation. They are scared that their teachers will be punished and that the teachers will then punish the learners. “This is the first time I’ve ever been asked how good my teachers are,” says a worried Khetiwe. “I wonder what Mrs Mogase is up to now?”

Mrs Thibane looks at the letter and is terrified. “This is not good,” she says as she looks at the notice. Luckily, Mrs Mogase hears via the grapevine how scared everyone is. She decides that she had better explain that an evaluation is not done in order to punish anyone, but rather to improve the work of the centre. She says that even if the centre is already doing well, the evaluation will help everyone to do even better.

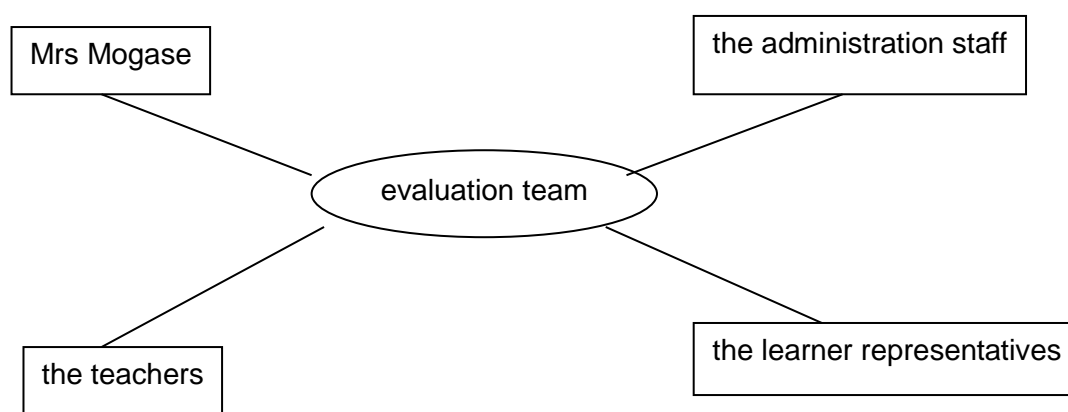
Once people understand what the evaluation is all about, they actually get excited about it. The teachers are glad that the evaluation is not being done behind their backs,* and the learners are happy because their views are seen as important.



ACTIVITY 2

Draw a diagram to show who you think should attend the meeting. Now say why you think it is important that each of the groups of people you have included should attend the meeting.

Our diagram looks like this:



Mrs Mogase’s agenda includes a few questions. Go back and look at them. Now let’s consider each of the issues that Mrs Mogase raised

5.3. WHY DO WE NEED TO DO AN EVALUATION?

Even if we do a needs analysis before we start a project, we can never be certain how the community will respond to or experience the project. So, we need to find out whether things are going according to our plans and where we need to make changes to the project.

STUDY SKILLS: Essays have to have an argument

We think that it is a good idea to stop at this point and to think about the question, “Why do we need to do an evaluation?” If you were asked to write an essay in which you answered this question, you would have to present an argument.

To do this, think about why it would be a good (or a bad) thing to evaluate a project. If you want to show that it is a good thing, you will have to give evidence that will convince your reader that it is good to evaluate projects. Later you will see that we give lots of reasons for why we think evaluation is a good thing. If, on the other hand, you want to show that evaluating projects is a bad thing (we don’t think it is!), then you would include points like the ones below in your argument:

- it is expensive
- it takes up lots of time
- it frightens the staff

So when you write an essay, you always have to take a position (in this case, that evaluation is either a good thing or a bad thing) and then write an argument that will support this position. Once again, look through all the essay topics that we have set for you this year and try to identify what the argument could have been. Then think about what points you could have used to support your argument.

Now let’s listen to how the people in Mrs Mogase’s meeting answer the question, “Why do we need to do an evaluation?”

Case study: Reasons for doing an evaluation

Mr Moloi, who was so worried about the evaluation in the beginning, is now full of excitement about it. He is so excited that he spills his tea again. “I want to become a better teacher, so I would like to know how my learners feel about what and how I teach them,” he says. Mrs Mogase responds, “That’s a useful start, Mr Moloi. But I think you need to become a better tea drinker too – you are always spilling!”

“But seriously, we want to know whether we are working to the best of our ability. We must try to find out whether what we are teaching is useful to our learners. Is there a need for our work, or are we wasting time and money? We also need to look at whether we have enough facilities to do our jobs properly. And,” she adds, “we need to evaluate how well the project is being managed. I need to know whether I’m doing everything I need to, and whether I’m doing it correctly.”

While the meeting is going on, Thabo, the project administrator (do you remember him from unit 4?), is listening through the key hole. He is too afraid to join the meeting because he is scared that he will be in trouble.

There are many reasons for evaluating a project

There are many reasons why managers of projects evaluate their work.



ACTIVITY 3

Read the case study again. Mrs Mogase gives a number of reasons for evaluating the project. What are they? Write them down briefly.

Mrs Mogase wants to find answers to the following questions.

- *Are we meeting our aims?*

Mrs Mogase explains that she needs to find out whether the project is meeting its aims. Evaluations must look at whether there is a need for a particular project and whether the project is useful to the people it is intended for. The question we have to ask is: Do the aims and objectives of the project meet the needs of the people it is serving?

- *Can the teaching be improved?*

Mrs Mogase tells the teachers that the information they get from the evaluation will tell them where they can improve. If they use the information, the ALEX centre will do what it does better.

- *Is the project's money being well spent?*

Because the ALEX project receives donor money, it is important that the staff look closely at how the money is being spent. Is money being wasted? Can the money be put to better use? These are the kinds of things a good evaluation looks at.

- *Does the project have adequate facilities?*

Mrs Mogase says that the evaluation will look at the kinds of equipment they have at the ALEX centre. This will allow them to assess whether the project has the equipment, such as classrooms, materials, electricity and so on, that it needs to teach properly.

- *Is the project well managed?*

Mrs Mogase says that even management should be evaluated to see whether they are doing what they should be doing. An evaluation should also look at whether the different parts of the project (such as the administration and the teaching) are well **coordinated*** and working well together.

These are important questions to ask during an evaluation. If the answer to any of the questions is "no", then changes need to be made to the project and its work.

5.3.2. Who would be interested in the findings of the evaluation?

The reason for evaluating a project is that the manager of a project is **accountable*** to other people or organisations that have an interest in the project. These people or organisations might include

- the funders or the people or organisations who give money to the project. They will want to know that the money is not being wasted.

- the management committee, who have the job of ensuring that the project does its job properly.
- the managers, supervisors and workers in a project. They need to know whether, and how, their work can be improved.
- the project's **constituency**,* or the people who make use of the services the project offers. In the case of the ALEX centre, the constituency is the learners and the communities from which they come.

5.4. WHAT DO WE WANT TO EVALUATE?

Earlier we spoke about why we should evaluate projects.

We know that there are many reasons for evaluating a project. But what will the evaluators look at? Who will they speak to?

Let's return to our case study for a moment and see what the people at the ALEX centre would like to evaluate.

Case study: Other things to evaluate

One of the learners, Khetiwe, says, "We have mentioned many things: aims and objectives, courses, study materials, teaching skills and methods. But the centre should also offer other services which are important to learners, such as a library, photocopiers and telephones, a cafeteria, and nice gardens to sit in at tea and lunchtime. We must evaluate whether these are good enough. We don't have most of them." Another student, Nompilo, adds, "and what about transport to and from the centre?"

Mrs Khumalo, the bookkeeper, has been trying to say something for a while now. She jumps up (bumping Mr Moloi so that he spills his tea again) and says, "I think the administrative system needs to be evaluated. I have to account for all the money spent, but people don't want to fill in the right forms. When it comes to the end of the year, I have to chase people to get cash slips for things they bought with petty cash* in February or May. It's impossible. That's why I'm so careful about giving people permission to buy things. I know people think I'm just a difficult person, but they must understand my problems." The secretary, Miss Mtshali, says, "And the same applies to leave forms."

Would it be possible to evaluate everything that has been suggested? An evaluation takes time and costs money. While it would be nice to be able to evaluate everything, very often this is not possible because it becomes too expensive and too **time consuming**.* We have to make choices about what the most important things to evaluate are. We could make a list in order of priority of all the possible things that can be evaluated and then see how far we can stretch our budget.

Based on the discussion during Mrs Mogase's meeting, let's see what this list might contain, before we prioritise items.



ACTIVITY 4

Look at the list of items below. There are 12 items altogether. Are some of the items more important than others? Rank* the items in the list by writing a number from 1 to 12 next to each one. Write 1 next to the item you think is the most important, and continue numbering the items until you have written 12 next to the item you think is least important.

- *aims and objectives*
- *courses*
- *public telephones*
- *transport to and from the centre*
- *management*
- *library*
- *photocopiers*
- *study materials*
- *a cafeteria*
- *nice gardens to sit in at tea and lunchtime*
- *teaching skills and methods*
- *administration*

This is what we think the order should be.

- 1 *Aims and objectives* – before we go any further we should know whether or not the project is doing something relevant and useful. If it is not, then the other items do not really matter because we should **rethink*** the whole project.
- 2 *Courses* – since it is an educational project, the courses that it teaches must be of good quality and must contribute to achieving the centre's aims and objectives.
- 3 *Study materials* – good courses can be effective only if the study materials from which the learners must learn are good.
- 4 *Teaching skills and methods* are important to a project. No matter how good the facilities are, the project is bound to fail if the teaching is bad.
- 5 *Management* – if the management is poor, the project cannot work well, even if the aims and objectives are relevant and the courses, study materials and quality of teaching are good.
- 6 *Administration* – people often forget how important administration is to a project. Evaluators should not make the same mistake.
- 7 *Library* – it is a great help to students if there are books, magazines, newspapers, videos and so on that they can read or watch to supplement (add to) the basic study material that they receive. But if the study material is good, then the absence of these extra resources is not a terrible loss.

- 8 *Transport to and from the centre* – this is a factor that should be taken into account in the decision about where to establish the centre, because it is no use setting it up in a remote area* where students have no way of getting to it. But other factors also affect this decision: often non-governmental organisations (NGOs) do not make a profit and have very small amounts of money available to pay rent. They cannot be too choosy about where to set up – they must take what they can afford, or, if they are lucky, what people will give them cheaply or for free. If there is no regular public transport available close by, it might be possible to make a deal with one or two taxi drivers to stop at the centre at fixed times, for example 8:00, 12:30 and 16:30.
- 9 *Photocopiers* – it is useful, but not crucial* (if the study materials are good), for students to be able to make copies of extra material that interests them so that they can read it at home.
- 10 *A cafeteria* – hungry and thirsty students do not have the energy to learn very well. We are putting this item lower down on our list of priorities, however, because while it is convenient to have a cafeteria nearby, if there is not one, people can bring food from home. Also, people selling food are bound to set up a stall near to the centre.
- 11 *Public telephones* – while these would be nice, they are not crucial to the effective functioning of the centre and the students' learning. There are other much more important things.
- 12 *Nice gardens to sit in at tea and lunchtime* – these are also nice to have, but the project can manage without them.

You may disagree with us about the order of priorities. This is not a problem, because there is no single correct answer for all situations. The people involved in the evaluation must choose their own priorities to suit their own needs and circumstances. It is quite likely that different organisations would have different items on their list and would prioritise them differently. Once you have drawn up a list of items to be evaluated in order of priority, you can begin to plan the evaluation itself.

5.5. HOW DO WE DO AN EVALUATION?

Once we have decided on our list of priorities, we need to work out a way of evaluating each item. We may need to use different methods to evaluate different items on the list. We will condense some of the more important items from our list above into three points, and base our discussion in this section on them.

5.5.1. Evaluating aims and objectives

If we look at the **constitution*** of the ALEX centre, we will find the aims and objectives listed there. This is what it says:

The aims and objectives of the ALEX Centre for Social Development are:

- to offer good courses to young people and adults in literacy, numeracy, small business management, environmental education, primary health care, development, and any other subjects that are needed by the community of Alexandra and its neighbouring suburbs
- to help to improve the quality of life of people in the community through the courses
- to keep the fees as low as possible, bearing in mind that the centre must generate enough money to keep running
- to consult the community regularly to see whether the courses are relevant

- to operate in a democratic way and to invite representatives from the community to serve on the management committee

The question that we have to ask is: Are the aims and objectives relevant, in other words, is the centre doing something useful?

We need to consider the community in which the centre is based and identify its needs. In other words, we need to identify our learners, or potential learners, and conduct a needs analysis of Alexandra. If we do this, here are some of the things we may find.

Case study: A profile of Alexandra Township

Alexandra is a township just north of Johannesburg. It is roughly 8 square kilometres in area, and has a population of about 500 000. Many of the residents who have jobs work in the light industries around the township or as domestic workers in neighbouring suburbs. There are also teachers, businesspeople, managers and nurses who live in the better parts of the township. At least 50% of the residents of Alexandra are unemployed, however. If you drive through the township you will see men and women of different ages just sitting around with nothing to do, or drinking in one of the many shebeens in the area.

There are also many young people in Alexandra. Some of them go to school. Many older people never went to school at all, or went only for a few years. They cannot read, write or count. Some children are too young to go to school. Some of their parents are lucky enough to have jobs, but because there are no childcare facilities, these children are given to older, unemployed women to look after. These women have little knowledge of how to look after children, and often cannot cope with the number of children in their care. The result is lots of improperly cared-for children, some of whom roam the streets, getting up to mischief. Many of these children become ill because they are not properly fed, or because they are left to play in the rubbish dumps that exist all over the township.

Some people live in reasonable houses with electricity, water and toilets, but most live in small, broken-down houses or in shacks. Some people live in hostels. Some parts of Alexandra are informal settlements in which people live in shacks made of bits of wood, iron, cardboard or anything else they can find to build some sort of shelter. Many houses and shacks have no electricity, water or proper toilets. The roads are in terrible condition – many are sand roads with deep holes in the middle or on the sides.

There are obviously many poor people in Alexandra. One of the ways in which poor people survive is by joining stokvels or other kinds of groups which raise money and share it out among the group members.

However, many people cannot keep accurate records of the money in their stokvel because they cannot read, write or count. This makes even very simple bookkeeping impossible, and there are often fights between members over money.

There is one clinic to serve the whole community, but it does not have enough money or staff to cope with all the health problems in Alexandra. These problems include malnourished children, TB, diarrhoea, AIDS, alcoholism, wounds, broken arms and legs, and infections.

Now that we have an idea of some of the problems in Alexandra, let's look at who our learners, or potential learners, might be.



ACTIVITY 5

Read through the above case study carefully. Now underline all the possible groups of people you think could be potential learners for the ALEX centre, and compile a list of these groups.

These are some of the groups we identified:

- 1 adults with little or no schooling
- 2 out-of-school youth
- 3 unemployed people
- 4 unqualified child-minders
- 5 members of stokvels or other money-sharing organisations
- 6 shack and hostel dwellers
- 7 poor people

In the first two units of this module, we looked at ways of finding out community learning needs.



ACTIVITY 6

Based on the case study above and on what you know about determining community needs, draw up a list of what you think the learning needs of these different groups are.

Here is our list. Was your list similar, or different?

- 1 basic literacy and numeracy
- 2 primary health care and AIDS education
- 3 childcare
- 4 basic bookkeeping
- 5 programmes for out-of-school youth
- 6 courses teaching people how to set up self-help programmes, or small-scale food-growing schemes
- 7 training to help people find jobs, for example:
 - how to look for a job
 - skills training in fields where there are jobs, for example how to become an adult educator or an AIDS educator
 - skills training that might make it possible for someone to become self-employed, for instance by making bricks, building houses and fixing cars

On the basis of these two sets of information, we can now evaluate the aims and objectives of the ALEX centre.

Do you think there is a need for the kind of work done by the ALEX centre? In general, we think that there is a need for a number of courses aimed at different groups of people with different needs related in one way or another to development and social upliftment. So, in general, we could say that the aims and objectives of the ALEX centre are appropriate and relevant.

But let's look in more detail at the actual courses being offered. In item 1 of the aims and objectives, the following courses were mentioned specifically: literacy, numeracy, small business management, environmental education, primary health care, and development. There is a need for all of these courses. The constitution also left open the possibility of offering courses in any other subjects that are needed by the community of Alexandra and its neighbouring suburbs.

ACTIVITY 7



We know what courses the ALEX centre offers. Can you think of any courses that might be needed by the community of Alexandra that are not being offered?

We thought of the following as possible courses that the ALEX centre could consider offering:

- AIDS education
- childcare or child-minding skills
- basic bookkeeping
- job-related skills training
- setting up and running self-help programmes and small-scale food-growing schemes

If the centre expands the number of courses it offers to include these, it will be better able to meet its objectives of contributing to social upliftment and development in the community.

It is important to identify gaps in a project's work, but it is also important to realise the limits that finances put on the choices that a project can make. If there is not enough money to pay for course developers and writers as well as teachers, it might be impossible to offer new courses. One of the results of the evaluation might therefore be that the management committee is asked to investigate the possibility of raising extra funding for new courses in order to meet new community needs.

5.5.2. Evaluating the teaching at the centre

You will remember that Mrs Mogase said that the evaluation will look at the teaching at the ALEX centre. Why does she want to evaluate the teachers' performance? There are a number of reasons.



ACTIVITY 8

Try to think of as many reasons as you can for why we should evaluate the teaching abilities of our teachers. You will find that Mrs Mogase mentions a few in the above case studies.

Here are the reasons we thought of. How do yours compare?

- One of the main reasons is that we need to know whether the ALEX centre is meeting its aims and objectives through good teaching.
- If teachers are good, the principal needs to know this so that he or she can tell the teachers that they are doing good work. Being praised for good work is an important motivation* for teachers – it makes them feel that their efforts are recognised, and they will feel encouraged to continue putting in the extra time and energy necessary to teach well.
- If the principal knows what is good about some teachers' work, it will help him or her to use them as examples for new, inexperienced or not-so-good teachers. The principal can say to them, "Look at how Mrs Sithole does things. Why not try that in your class?"
- If certain teachers are bad or lazy, the principal needs to know this so that he or she can tell these teachers to improve their work. The principal needs to know in some detail exactly what is wrong with their work: are they just lazy, are they inexperienced, or do they lack certain skills or abilities? The solution in each of these situations is different:
- In the case of laziness, the principal may need to reprimand the teacher or tell him or her to improve
- In the case of inexperience or lack of skills or abilities, the teacher could receive training or support from other, more experienced or qualified teachers

How do we evaluate teachers' performance? There are two main ways. The first is what we call peer review. A teacher's peers* (colleagues or co-workers) can review his or her teaching. The principal can observe a few classes taught by his or her senior teachers and write a report on each one of them. These senior teachers can do the same with junior teachers. These reports would cover issues such as:

- Did the teacher arrive on time for the class?
- Was he or she well prepared?
- Were the learners invited to participate actively in the lesson, or were they just given a boring lecture?
- Does the teacher have a good relationship with the learners?
- Does the teacher mark learners' work in good time and give enough feedback of high quality?

A member of the management committee can then write a report on the principal's performance, paying attention to his or her managerial, administrative and teaching (if the principal teaches) performance and any other activities he or she undertakes.

The second way is to get learners to review the work of their teachers. The evaluation committee can conduct a survey of learners' opinions on important aspects of their teachers' performance. The most common way of doing this is to design and produce a **questionnaire*** which learners can fill in without writing their name or student number on it. We call this an **anonymous*** questionnaire and it allows learners to answer the questions honestly without

being afraid that they will be punished. Because their names or student numbers do not appear on their answers, no-one can identify who said what.

The questionnaire is usually designed so that the learners just answer “yes”, “no”, “sometimes”, “always”, “often”, “seldom”, “never”, and so on by making a cross in a box. This makes it very easy to add up the answers in each category to each question. We can then get a **statistical picture**.^{*} For example, we might find that 66% of the learners answered “no” to the question, “Does your teacher come to classes prepared?” This indicates clearly that there is a problem. If only 2% of learners answered “no”, then it would be much less of a problem.

Often the methods are combined, and information is obtained through both peer review and learner questionnaires. Also, sometimes we can just speak to learners and find out information that might be useful.

5.5.3. Evaluating management and administration

It is very important to evaluate the management and administration of the project. Management must be evaluated because a badly managed project will fail to meet its aims and objectives, and will not receive funding. In fact, it may not survive long because its funding will run out if it is badly managed. One of the crucial functions of management is to ensure that existing funds are properly administered and that new funds are raised in time for the next financial year.^{*} This is why annual reports^{*} and audited financial statements^{*} are important. They indicate to anyone who is interested that, over the past year, the project worked towards achieving its aims and objectives and can demonstrate its successes by listing them. They also show that the money was well spent, and that there was no corruption or misuse of funds.

In addition to management, administration must be evaluated, because administration is the backbone^{*} of the whole project. The project will collapse into chaos if documents such as minutes of meetings cannot be found, stationery is not ordered, telephones are not answered or letters replied to, expenses are not controlled, teachers’ leave is not regulated, learners’ records are not kept up to date, and so on. Bad administration is a sign of bad management.

When evaluating management, we need to know the following, among other things:

- When new staff have to be appointed, are proper selection procedures followed? (Selection procedures are the way in which we choose staff. For example, do we put up advertisements for a new post and then interview people who we think are suitable for the job?) Are the selection criteria appropriate? (By selection criteria we mean the qualities we look for in a person before we appoint him or her. We have to be sure that the person has the proper qualifications for the job and that he or she will be able to do it properly.)
- Is the performance of staff monitored^{*} regularly so that high standards can be maintained?
- Is adequate funding raised in good time so that money does not run out before the end of the year?
- Are expenses monitored and controlled?
- Are annual reports and audited financial statements prepared?
- Are regular meetings of the management committee held?

One fairly quick and cheap way of evaluating administration is to appoint a person, a teacher perhaps, and ask him or her to try and find out the answers to certain questions. How easily and how quickly he or she can find the answers indicates how good the administration is. (Do you remember how long it took Mr Mokoena to find the information he needed in unit 4? The length of time he took gives us an indication of how bad his administrative system was.)

The person could ask questions such as:

- ✧ How much leave has each of the teachers taken so far this year?
- ✧ How many learners are registered for each course this year? How does this compare with last year?
- ✧ How many learners have passed or failed the various courses so far this year?
- ✧ How much money has been spent on stationery, telephone accounts, salaries and wages so far this year?

If the person in charge of administration cannot answer these questions easily, then your administration system is in a bad state. You need to find out why this is so and then take the necessary steps to improve it. The administrator may be lazy, or perhaps does not have the skills. If the person is lazy what do you do? If the person lacks the skills, what do you do? The answers to these kinds of questions can guide you in deciding on how to improve your administration system.

5.6. WHAT DO WE DO WITH THE RESULTS OF THE EVALUATION?

An evaluation costs a lot in terms of both time and money. In order to justify* the evaluation, you must tell the staff what the results are. Where things are working well, this must be noted and monitored to ensure that they continue to work well in future. Where things are not working well, changes need to be made and the effect of these changes must be evaluated to see whether they really do improve the situation.

It is often a good idea to make the results of the evaluation public, even if this shows that the project has a number of weaknesses. This shows that the project is committed to transparency.* People will have more confidence in an organisation that admits its mistakes and takes steps to correct them than in one that tries to cover up its weaknesses and pretend that everything is good. Funders especially will be impressed by this openness and willingness to learn from past mistakes, and will be more likely to continue funding the project.

CONCLUSION

Let's conclude by returning for the last time to our case study, to see what Mrs Mogase says about the evaluation.

Case study: After the evaluation

It is now a month later. Mrs Mogase has gathered everyone together to discuss the findings of the evaluation. "Overall," she says, "the centre got a good report. This is not surprising, since I and quite a few of the staff are graduates of the Unisa ABET Institute. We know how to set up and run a good programme. But there are a few areas where we can improve. We need to investigate offering new courses, but this will cost money, so our next funding application must include these extra costs in the proposed budget. Mr Mokoena's administration needs to be improved, and everyone needs to cooperate with the administrators by filling in leave forms properly, and by following the proper procedures for spending petty cash. We should also plan to evaluate the project more often. If we cannot do this every year, then we should do it every two years. After we have done this a few times we will have a good idea of how things have changed over the years, hopefully for the better. I'm sure we'll also get better at doing

evaluation, and so it won't take a full month next time. Oh, I almost forgot. We'll have to do something about getting Mr Moloji a teacup that he can't knock over."

GLOSSARY

Accountable	When we say that someone is accountable to somebody else, we mean that he or she must be able to give good reasons for what he or she has decided to do with, for example, money that has been donated to a project.
Annual report	This is a report which describes everything that a project, for example, has done and achieved in the past year.
Anonymous	If something is anonymous, there is no indication of who wrote or said it.
Audited financials Statements	The financial statements of a project show all the money that the project has received and how much it has spent. The financial statements also tell us where the money has come from and what it has been spent on. If we say the financial statements have been audited , we mean that they have been carefully checked by a qualified person, such as an accountant.
Backbone	If we say that administration is the backbone of a project, we mean that administration plays a very important part in helping the project to function really well.
Behind their backs	To do something behind people's backs is to do it without telling them about it.
Coordinated	If the different parts of a project are coordinated, they work well together to give a good result.
Constituency	A project's constituency is the people and the communities that the project serves.
Constitution	A constitution is a legal document which states the rules according to which an organisation operates. It says who can participate, how decisions are made, how officials are elected and so on. Countries also have constitutions which state how the government must function.
Crucial	Extremely important.
Evaluate	To consider the good and bad characteristics of something and judge how valuable or important it is.
Financial year	The financial year of a project is a period of 12 months for which accounts have to be kept for a project. The financial year can be any 12 months; it does not have to be from January to December. The financial year often goes from the beginning of March in one year to the end of February in the next year.
Justify	If we can justify an evaluation, we mean that we have good reasons for spending time and money on doing the evaluation and that we will use the results to improve the project.

Monitored	Checked regularly to see that it is working. We also monitor people to see that they are doing their job properly.
Motivation	Motivation is something which makes people want to work better or harder. Praise and encouragement and also things like better wages or some sort of reward are all forms of motivation.
Peers	Our peers are the people we work or study with.
Petty cash	A small sum of money you keep in the office to buy small things like milk or newspapers. Cash slips must be kept so that you can account for the money spent.
Project planning:	Evaluation plan: planning project evaluation is done by the core stakeholders in consultation with the project manager. Also important is to report on evaluation activities in progress reports and the final report and disseminate the report to the relevant core stakeholders.
Questionnaire	A list of questions which we ask people to answer. We use a questionnaire when we are doing research about something.
Rank	When you rank things, you arrange them in a particular sequence or order to show which things are important and which are not so important.
Remote area	An area which is far away from the cities and towns. It may not have the same facilities as a bigger urban settlement. People may not be able to find transport to a remote area.
Rethink	If we decide to rethink a project, we have decided that the project is not working well and we need to start at the beginning again and decide on new aims and objectives.
Statistical picture	A statistical picture uses numbers to give us information. In a questionnaire a statistical picture tells us how many people agree with something and how many people disagree with it.
Time-consuming	Something which is time-consuming takes a lot of time to do.
Transparency	Openness. If a project is transparent, it means that we are not afraid to let people know that it has weak points in addition to its strong points.

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