

Operate a basic administration system for a small CBO



Level 2

Learner Manual

The learning materials for Development Practice and Management were specifically designed to complement and give substance to the competence standards drafted with the assistance of community based development practitioners in South Africa. It is envisaged that practitioners, capacity builders, grant-makers and others will use these standards and learning materials, improve them and in turn share their learning with others via www.developmentpractice.org.za.

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Operate a basic administration system for a small CBO

Level 2

- Learner Manual -

The development practice project

These learning materials were generated by the Development Practice project, hosted by the [Sustainability Institute](#) and in partnership with [Community Connections](#), [AIDS Consortium](#) and [Keystone](#). This project generated a set of competence standards with development practitioners in Cape Town, Johannesburg and Durban, between 2005 and 2009. This manual is part of a set of **materials consisting of a competence standard, learner's manual, facilitator's guide** and an assessment tool. More information on this project is available on the [Development Practice](#) website.

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- The project team for logistics, coordination and editing

Questions and queries on the project and materials can be forwarded to info@developmentpractice.org.za.






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OVERVIEW

Welcome to this manual on *Operate a basic administration system – Level 2*. The manual will assist you to acquire knowledge, skills and values to operate a basic administration system in your CBO.

This learner manual, accompanied by a facilitated programme of activities, should **be followed by practical ‘on-the-job’ experience and practice** (supported by a mentor if possible). Once you have read through this learner manual, done all the exercises, implemented the learnings in your organisation, you will be ready to have your competence assessed, if you choose.

Below follows the Specific Outcomes and Assessment Criteria that this learner manual is based on. This means that at the end of your learning period, you will be able to practice all the points listed below. During the learning period you will be reminded to keep and file proof of your work. This is called a Portfolio of Evidence. It is a collection of evidence to show what was learnt during the course and from past experience, including all other training courses attended. Recognition of prior learning (RPL) is when all your learning is taken into account and acknowledged when assessed for a specific standard. Outcomes are the result of your learning. At the end of each section there is a symbol for you to check your understanding.

Please read the competency standard below carefully.



SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i>	<i>Tasks and activities completed by the learner contain the following evidence of competence...</i>
1. Interact positively with staff and the public	<ul style="list-style-type: none"> • Must have updated info on organisation • Understanding primary client groups are in org / services • Public face of organisation • Pivotal role/ operating front office • Able to define self in organisation- own role and contribution • Understand your role in and contribution administration within the organisation
2. Maintain a basic filing system	<ul style="list-style-type: none"> • Useful categories for filing are listed (funders, staff, organisational documents) • Ordered and accessible files are kept (labelling, use of file dividers, alphabetical ordering etc) • Current files are up to date and accessible • Important documents are kept for as long as they are needed
3. Use basic tools for organising work	<ul style="list-style-type: none"> • Basic time management tools are identified and used (Calendar, timetables or diaries) • Methods to manage tasks are described and used (to-do lists, checklists, rosters, job lists etc)
4. Keep relevant admin records	<ul style="list-style-type: none"> • Accurate minutes that capture the main points of meeting are kept (staff meetings, board meetings) • Examples of relevant records that should be kept are provided (for example registers etc)
5. Manage basic office functions	<ul style="list-style-type: none"> • List items needed in a basic office (stationary, telephone, desk etc) • A neat and ordered office space is maintained (within the constraints of the under-resourced environment)



	<ul style="list-style-type: none">• Demonstrate use of basic office equipment (fax machine, telephone etc)• Criteria for creating a welcoming environment are listed (Visitors greeted and attended to; appropriate telephone and reception manner displayed)• Communication is dealt with and managed responsibly (correspondence; telephone calls, messages; visitors; appropriate referral and follow up)• Basic administrative rules and procedures are described (Managing equipment, consulting before acting, ways to handle correspondence, security, staff and assets registers etc)
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NOTE: The information in brackets suggests but does not limit an appropriate range of criteria for assessment.

A basic administration system for a small CBO might require limited files e.g. 2 or 3; a few if any, staff records; a simple minute book; records of a few activities; often based on small informal space. The learner at this level maybe required to set up a very simple system or operate a more complex system under supervision.

Tasks may be presented for an actual or hypothetical organisation but must be **learner's original work and not copied from existing documents. Learners should be able to explain and justify their statements.**





ACTIVITIES

There are a number of activities in the manual. These activities are an important part of the learning approach and you are encouraged to complete them as part of **your learning process. They will become part of your own “toolkit” to help you** operate more effectively. Some of these activities can also be used as part of your portfolio of evidence (PoE), which you need to compile if you wish to be assessed for competence in this standard.



Symbols used in this workbook



Important thought

This sign shows an important thought or idea for you to take note of.



Definition

When you see this sign, a term is explained here.



Self-test

This designates a self-test section - this is an opportunity for you to check your understanding and if you are unclear, to discuss with your trainer.



Case study/Example

Case studies or examples will tell you about a practical application of something that has been discussed or covered in the course.



Individual activity

This sign marks an activity – either during the class or as homework. These activities are important to complete – both for your understanding but also as they can be included as part of your Portfolio of Evidence (PoE) for assessment.



Group activity

This sign means that this activity is a group work activity.



INTRODUCTION

Most CBOs have some sort of an office – it might be at someone’s home or in a community centre or you might share an office with another organisation. Maybe your organisation does not have an office yet, but you would like to set up a small office. The office is the place where many of the organisations’ activities happen. For many CBOs the space that is available is small and therefore it is very important that the office is organised and well run. Having a basic administrative system will help your organisation to function more effectively. One needs to find information easily, keep good records of all the activities of the organisation and create a good environment for all who come to visit the office. In this manual we will look at these.

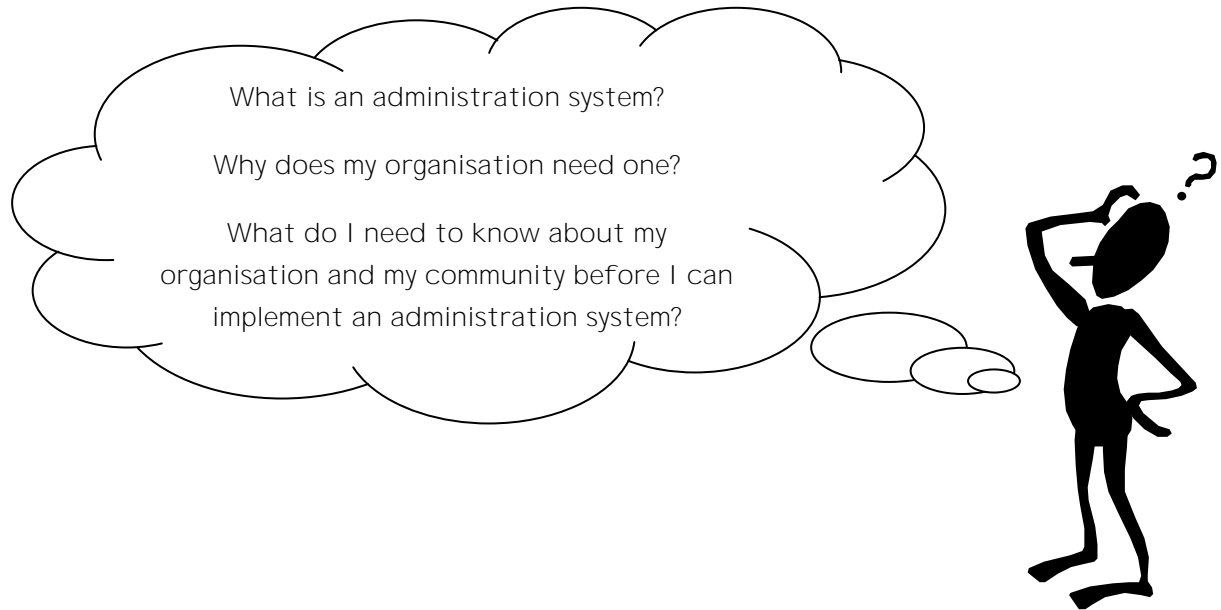




AN ADMINISTRATION SYSTEM

In order to start an administration system in the office of the organisation one needs to understand what exactly is meant by an administration system.

Ask yourself a few questions:



What is an administration system?

A basic administration system for a small CBO might need some files e.g. 2 or 3; a few staff records; a simple minute book; records of a few activities; often based on a small informal space. An administration system is also not just keeping files and good records. It also includes creating an image of your organisation for visitors because the admin person is often the first person that people come into contact with when they come to the organisation.

The basic administration system in an organisation therefore, needs to help to:

- Make your office space look neat and welcoming to visitors and clients;

- Keep information organised in files;
- Keep all correspondence that you send and receive;
- Make sure that you have all the important documents that are needed in your organisation e.g. a constitution, NPO registration etc.;
- Keep all information about your clients neat and organised;
- Organise your time better so that you get everything done that you planned each day;
- Keep good minutes of your meetings;
- Ensure that you deal with telephone calls, visitors and other referrals in a proper way.



Case study

The Luthando support group had been meeting at their local clinic for the past 2 years. The group was started by volunteers to provide support to mothers living with HIV&AIDS. They then formed a small CBO to do the work. Since the start of their organisation, the support group had grown and the volunteers were well regarded by their community. They decided that it would be a good idea to have a little office where they could keep information about their CBO. This would mean that they would need to set up a basic administration system for their CBO.



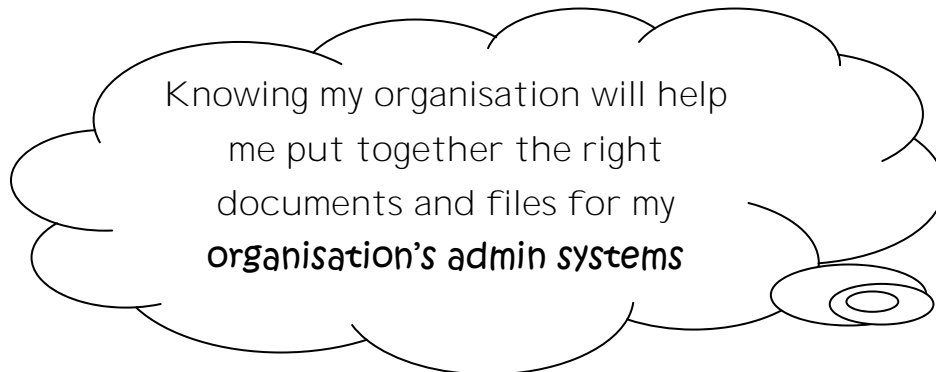
Case study

Now that the volunteers from Luthando had decided to start an administration system for their CBO, they decided that they needed to put a few things in place to make it happen. A new volunteer at Luthando offered a small office for the organisation at her house. This would be a place where the volunteers could meet and where visitors could get information about the project. One day someone came to visit the project to find out more about what they did. The other volunteers were not in the office and she realised that she could not answer all the **questions that the person had, because she was new and didn't know the organisation well.** She met with the other volunteers after this happened and explained to them that it was important for her to know as much as possible about Luthando so that she can answer questions about the organisation. For example, if new people came to join the support group or if others came to visit the project. They realised that they needed to understand their clients so that they could provide good services to them. They decided to start a file about their organisation and their community with information that they could use when they applied for funding. It would be important to understand their clients and community well. They agreed that the chairperson of their board and the volunteer co-ordinator would be good people to put together the information. They would then share this information with all the volunteers, including the one who was responsible for the office



In order to have a good relationship with the CBO and the community, it is important that you learn about the community and also know the organisation so that you can tell the community about the organisation and its services. We need to know:

- The history of our organisation – when did it start?
- The aim of our organisation – why did it start and what do we want to achieve through our organisation?
- The clients of our organisation – who do we provide services to?
- The rules and procedures of our organisation – what makes the organisation function well?





Individual activity

Just like the volunteers of Luthando, see if you can answer the following questions about your own organisation:

1. When did your organisation start?
2. What is the aim of your organisation – what do you want to achieve?
3. Who do you provide services to?
4. What services do you provide?
5. Does your organisation have a constitution?
6. Does your organisation have rules and procedures to make it function well?

Maybe you need to ask someone at the organisation for more information to answer the above questions.



What does the community think of our organisation?

Now that you know what your organisation is all about let's look at how the rest of the community feels about the organisation. There are many different organisations that work in a community. The community might think that certain organisations are better than others. They might think that the one organisation's services are better than that of another one. Every organisation has a 'face' that they show to the community – an image of what they want people to think of them.



Definition

How you want people to see your organisation is your public image – the face that you show to those outside the organisation that allows you to promote the organisation in a positive way, build good relationships and ensure effective service delivery.



Group activity

What do you want the community and other stakeholders to think of your organisation? What values in the organisation are important for them to know? Discuss ways that you can improve how people see your organisation





Self-test

You should be able to:

- Update information about your organisation
- Understand your clients and community
- Know how the public see the organisation
- Understand the important role of the office
- Define your own role in the organisation and your contribution to the **organisation's administration system**

Please ask your facilitator if you are unsure of any of the above.

BASIC OFFICE FUNCTIONS

What should the office look like?

Every organisation's office looks different. Some organisations might have a small office that is just one room and another organisation might have a nice big office where there is a separate reception area and office for staff. This depends on the resources available to the organisation. Now that you have an office space, you need to know how to operate the office in the best possible way.



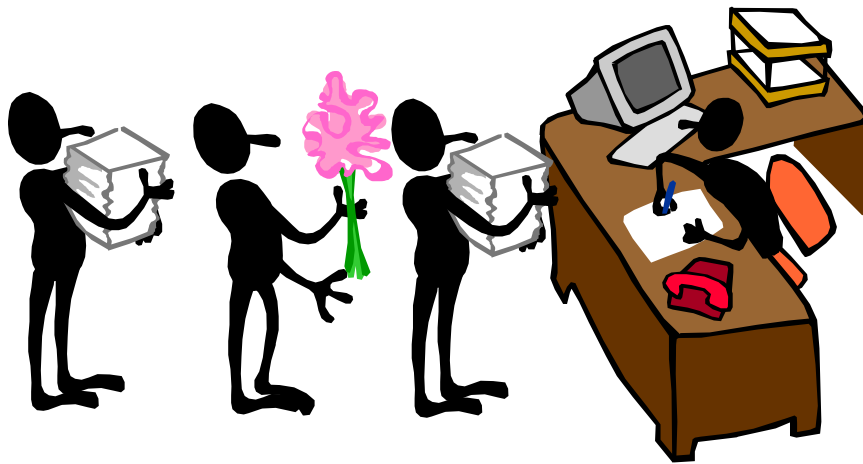
Group activity

1. Brainstorm in your group what your wish list would be to have in an office. Think of furniture and equipment and any other things that might be necessary.



The office might be in someone's home or it might be an office at the clinic. The organisation might be sharing the office with another organisation. Where the office is, might impact on what is available to set up the office. Some of the basic things that are necessary for an office are:

- A desk or table where you can write and do your administration work
- Chairs
- Telephone – it would be best to have a landline as it is much cheaper than using a cell phone.
- Basic office stationery e.g. paper, pens, stapler, paperclips etc.



Depending on the resources that are available there are other office furniture and equipment that help to create an effective and efficient work environment:

- Filing cabinet to keep your files
- Cupboard that can be locked for stationery and other office supplies
- Office equipment like a fax machine, computer, printer and photocopier
- Board room table for meetings

- Extra chairs for visitors or clients
- Notice board
- Kitchen facilities e.g. to make tea



Important thought

When you are looking at what you need for your office - keep in mind the security of the office as well to ensure that office equipment is not stolen or damaged. If you have computers and other equipment like a fax machine or photocopier, you might need to ensure that the building has burglar bars and that the office is always locked. You might also need to find out about insuring your office equipment.

It is also important to remember the following in the office:

- Is there a safe place to keep the petty cash box?
- Is the office able to lock properly; who keeps the office key?



Group activity

1. Look at the wish list again and look at what you can have in terms of the resources that are available. With limited resources, only look at the essential needs. Make a list below.
2. Let everyone in the group make a list of the office furniture and equipment that they have in their organisation.
3. Make a list of the office stationery that is needed – compare that to what you actually have.
4. Discuss in your group what you can do if you have very limited resources – where can you get the things that you need for your office e.g. sponsorships, donations etc.





Important thought

If you are going to ask for sponsorships or donations and you are writing a letter of appeal remember to be very specific about your request. For example if you are asking for office furniture, be specific and ask for 1 desk and a filing cabinet.



Group activity

Share in your group the ways that you have gone about getting equipment or other resources. Group members may also have other ideas about how to get whatever you may need for your office or for the running of your project. Share these ideas in the group.



Creating a positive and welcoming environment at our office

The backbone of a good administration system is an office that works well. The office needs to be welcoming and provide a space where information can be kept, visitors can be met and meetings can be held. All of these are part of running the **administration system of the organisation. Let's see what happened at Luthando.**



Case study / Example

The volunteers at Luthando now had all the information about their organisation and their community ready. They also realised that the little office that they had at the volunteer's house needed to be changed a bit to make it more welcoming so that it could also be a place where they could keep their information, have meetings and maybe invite others. They all got together and decided to dream about the perfect office – all the things that they would want in such an office, how it must look etc. When they made their list of the perfect office they realised that they did not have the resources. The chairperson of the board then suggested that they needed to look at what they could do with the resources that they did have. The community already liked the work that Luthando was doing and therefore they had a positive image in the community. All they needed to do was to make the office look nice and be a welcoming place for people to come and visit.

The chairperson of the board went to a company who does training for office staff and asked if they could sponsor some of the volunteers to go on a course to learn how to run the office better. At the training the volunteers from Luthando learnt



about how to welcome (receive) visitors when they come to the organisation, how to be professional as well as some other practical examples that would make their office look neat and more efficient. One of the most important things that they learnt was that even if one does not have fancy equipment and a big office you can create a positive and welcoming environment that will make people feel at home. This will help to improve the image of your organisation.

As we can see from the case study the atmosphere that you create in your office is very important. Often it is the first step in building relationships with your clients and the community.

The office helps to create a positive image of the organisation. The office serves the following functions:

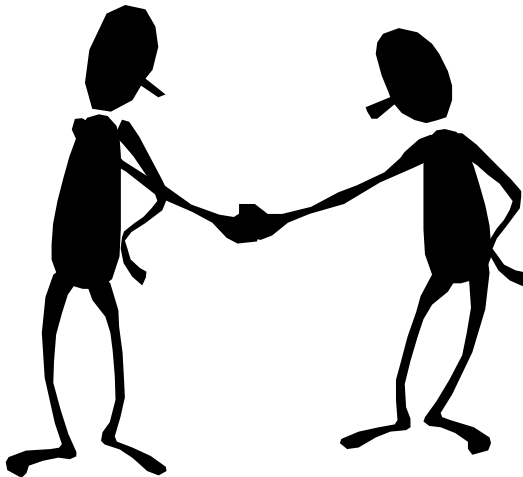
- Receiving visitors – in most organisations, visitors will spend some time in the office before being seen by another person. It is very important that you receive people in a warm and friendly manner, make them feel comfortable and welcome.
- Giving information – Not all visitors come for appointments with other staff. The person in the office often helps with other matters – e.g. they give them information brochures or refer them somewhere else if necessary
- Dealing with telephone calls – It is very important to deal with telephone calls politely and respectfully. Greet and ask how you can be of assistance. Take messages and pass them on to the relevant people.



These functions are very important to the organisation and everyone should be aware of them.

Receiving visitors

The office is often the first contact that people have with an organisation. The work differs from one organisation to the other depending on the type of service that is provided by the organisation and how big the organisation is.



- Make sure every visitor feels welcome and is greeted as soon as they enter the office. Be friendly and welcoming.

- Find out who s/he has come to see or what you can assist them with.

- Find out if they have an appointment to see someone. You may find that you can assist them. If you cannot help and the

organisation welcomes visitors at any time without appointments, find out if the person they have come to see is available and inform them that they have a visitor. If the person who is being visited is not available, find out if there is anything you can do to help:

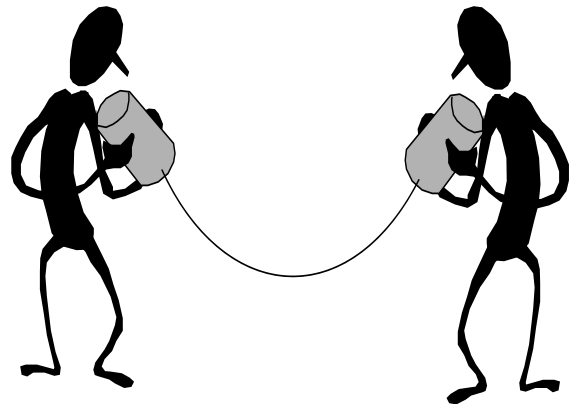
- You can ask the visitor to wait if the person will not be long, offer them something to drink (like water) and read.
- **Take the visitor's details and make sure you write them on a piece of paper, visible for the reader to action.**
- Assure the visitor that the message will get to the correct person.

If you cannot help, call a person who can. Never give incorrect information or bad advice. Always have your organisational brochures, pamphlets and simple documents available to assist you in giving the information to the relevant people.

Dealing with telephone calls

❑ Answering the phone

Deal with telephone calls in the same way as you deal with visitors – be polite, helpful and friendly. Put people through as quickly as possible – if someone is not available, get back to them and take a message. There is nothing worse than holding on for a long time – it **wastes people's** time and money.



- The best way to answer the phone is – "Name of organisation, hello, how can I help you?"
- If you have to put someone through, say " Please hold, I am putting you through"
- If the line is engaged, say: "S/he is on a call, would you like to hold or can I take a message?"



Important thought

Rules for answering the telephone

- Always be polite and welcoming.
- Keep your conversation as brief as possible without sounding rude or in a hurry
- Make sure that you know your telephone system and are able to use all the facilities.

❑ Taking messages

Make sure that you have a system in place for taking messages and that all staff and volunteers know what the procedures are. It is also a good idea to have a special book for taking messages so that all messages can be written down. The standard telephone message books have a duplicate copy in the book, in case someone loses the message.



Example: Telephone message



While you were out

To: _____ Date: _____

Caller: _____ Time: _____

From: (organisation) _____

Their phone number: _____

Phone back
 They will phone you back

Left this message:

Message taken by: _____

Date: _____

Dealing with information and correspondence

Another important part of good communication in your office is the way in which all correspondence – letters, faxes and e-mails are handled. Using a record-sheet that records all correspondence is a good way to make sure that things are dealt with and not forgotten. You can also develop some rules around the handling of all correspondence. We will look at these in the next section.





Group activity

Once you have made the list, you need to practice them. Role plays will help you in the group to practice the right way of answering the telephone and taking messages; receiving visitors and giving people information about the organisation.

Each CBO also needs to think about the following questions:



Who is going to be at the office during the day? Is it the same person every day or a different person?

Will the office be open every day or will we have specific hours for the office to be open?

Where will our office be – **in someone's** house, at the clinic or in the community centre?





Important thought

Remember that if the office is only going to be open for certain hours, use a poster to inform clients about your organisation's contact details and office hours.



Individual activity

Think of your own organisation and answer the following questions:

- 1) Where is the office?
- 2) Is there one person who is always in the office when people come and visit the office?
- 3) When is the office open?
- 4) How do we inform people about the office hours of our organisation?



How to use different office equipment

Some of us might not be used to working with the different machines and **equipment we find in the office**. Let's look at the basic instructions for some of the commonly used office equipment.

Telephone

For most of us using a telephone is easy because we use it almost every day. In an office environment there are some rules for using the telephone, which we will discuss a bit later, under telephone manner.



Fax machine

When you buy a fax machine for your organisation they come with the instructions on how to use them. Most fax machines today are quite easy to use. The basic instructions to use a fax machine are:

1. Place the pages that you want to send into your machine, by following the instructions for that specific machine. In some machines the paper needs to be face down and in others the writing has to face up – check to see what your machine needs.
2. Dial the fax number that you want to send your fax to and press the START or SEND button. The fax will automatically be sent when the signal is heard.



3. If you have an older fax machine you might have to wait for the signal and then press the START/SEND button.



To receive a fax, make sure that your fax machine is turned on and that you have paper in the fax machine. When the fax rings it will automatically receive the fax and print it out.

Some phones can also work as a fax machine. In this case there are different settings on the front of the phone that shows in which mode it is.

PHONE	PHONE/FAX	FAX
-------	-----------	-----

- When the phone is on PHONE it will ring and you can answer the phone. If someone then wants to send a fax, you will have to press the FAX button. Sometimes it might be necessary to tell the person on the other end of the call to please call back and then you put the phone in FAX mode, so that it will automatically receive the fax.
- If the phone is in PHONE/FAX mode you need to answer the phone, before 5 rings if you want to use it as a phone. If you let it ring for longer, it will operate as a FAX.



Example: Fax cover sheet

Organisation address
Organisation Telephone number
Organisation Fax number

**Organisation's
Name**

Fax

To: _____ From: _____

Fax: _____ Pages: _____

Phone: _____ Date: _____

Re: _____

Urgent For Review Please Comment Please Reply

Dear

Your message

From



Computer and printer

Being able to use a computer and printer is a good skill to have and will help you use your administration system in your office. Many smaller CBOs however, do not have a computer. If you have a computer, it will be a good idea to go on a computer course to learn how to use your computer effectively.



To use the printer with your computer, remember the following:

- Make sure that the printer is plugged in to the computer.
- Make sure the printer software is loaded on the computer so that your computer is connected to the printer.
- Make sure the printer is switched on when you want to use it.
- Make sure your printer has paper in it.

If you experience problems with your printer, there is a HELP function that you can click onto that will tell you what the problem might be and how to solve it.

Photocopier

A photocopier is a very useful machine to have in your organisation. Many smaller CBOs may not have their own photocopier, but you may share with someone else or use one at a photocopy shop.

A photocopier is used to make lots of copies of the same document e.g. when you have to make 10 copies of the minutes of a meeting, it is cheaper to photocopy them than to print them out on the computer and printer.

Some photocopiers are very sophisticated and have lots of special functions, but the basic functions that you need are:

- Copying
- Sorting

The following instructions explain how to use a photocopier:

There are three available options for photocopying on the touch screen

1. Always select option for A4 paper size **for a 'normal' sized page**
2. Place the page you wish to photocopy in the machine
3. Press the green button to start photocopying or the button that says START/COPY if you are making one copy only.
4. For a specific number of copies press the number of your choice before you press the START/COPY button
5. Close the lid of the photocopier to ensure better quality of the copies
6. To cancel press the yellow button ©





Individual activity

1. It is important that you practice how to use all the office equipment. For the purpose of this activity you will have to practice on the following machines:
 - Telephone
 - Fax machine
 - Computer and printer
2. If you have these machines in your organisation you can practice on them. If you do not have them, ask one of the bigger organisations in your network if you could practice on their machine.

3. See if there is an instruction brochure or leaflet that was included with the machine , follow the instructions to:

- Answer and make a telephone call
- Send and receive a fax
- Print a letter from the computer (if you never use a computer in your organisation, this might not be necessary to do)

If the machine has not come with its own instructions, use the basic instructions given above to help you or ask someone who knows how to use the machine to show you. Practice on your own until you feel confident that you are able to use the machine.

How to keep the office organised and neat

As we have just seen an organisation's office can be in different places. Depending on the size of your office it is very important to make sure that your office space is always neat and organised. An office that is untidy and messy is not an office that can function well.



Case study

The office at Luthando was now functioning quite well. The volunteers were happy with the way in which the information was given to visitors and they had also improved the communication in the organisation by making sure that people got their letters and other messages on time. They still had one problem – the office was very small and there were lots of different documents and papers that they

needed to keep in the office. The co-ordinator realised that they had to find ways to make sure that the information was also organised properly, so that they could find it easily and keep important documents safely. The office had to be neat and tidy, so that if people came to visit, they would find an office that looked inviting. The volunteers and the co-ordinator had a meeting where they looked at different ways in which they could keep their office neat and organised.

As we have already said, our offices might be in different settings. Keeping your office space neat and ordered is very important.

Some tips for keeping your office and work space neat and tidy:

- Pack away or file documents or papers that you are not working with. **Don't** have unnecessary things lying around in the office.
- **If your office is very small, don't bring things to the office that you will not need to use there.**
- Store your office stationery in a cupboard so that things can be kept neat and tidy.
- Keep everything in its place and have a place for everything, so that it can be found when needed and everyone will know where to find it.





Group activity

1. Divide your group into 3 smaller groups and ask each group to look at one of the office settings that you might find yourself in:
 - **Office at someone's home**
 - Office at the clinic or other place of work
 - Office that you share with another organisation
2. Let each group look at ways that you can ensure that the office space in that particular place is kept neat and tidy.
3. Give feedback to the bigger group and discuss the possible solutions.



Administration rules and procedures in the office

In the same way as you have different policies and procedures for your staff and volunteers in the organisation, it is important to have some rules and procedures for the administration of your office. These rules should identify who is accountable for the administration systems and state what the internal rules of the organisation are. These rules may apply to:

- Records that need to be kept
- Correspondence
- Telephone use
- Use of office equipment and resources e.g. stationery
- Dealing with visitors



Example of an Administration rule: Telephone use

- No personal calls may be made from the office, but emergency calls may be received. If there are personal calls keep them short and only make them if absolutely necessary.
- Any telephone calls made should be recorded in the telephone record sheet – especially calls dialled so that costs can be controlled. Try not to phone cell

phones, rather use a land line, because cell phone calls are very expensive.

- The person responsible for answering the telephone at the office needs to always answer the phone according to the telephone process agreed to by their organisation.



Self-test

You should be able to:

- List items needed in a basic office
- List the criteria for creating a welcoming environment at the office
- Maintain a neat and tidy office space
- Demonstrate the use of basic office equipment e.g. fax machine
- Deal responsibly with communication in the office
- Describe basic administrative rules and procedures

Please ask your facilitator if you are unsure of any of the above.



BASIC TOOLS FOR ORGANISING WORK

We have now covered the following aspects of an administration system:

- What is an administration system?
- How to get to know your community and organisation better so that you can have the relevant information about them available at your office
- How to create a welcoming environment in your office for visitors and staff
- How to keep your office neat and organised
- How to make use of the different office equipment you have, correctly and effectively

In this next section we will look at how the administration system of your organisation can help you to also manage your time and your tasks better. If you use your time effectively you will get more done and the activities of your projects will be done within the time allowed.

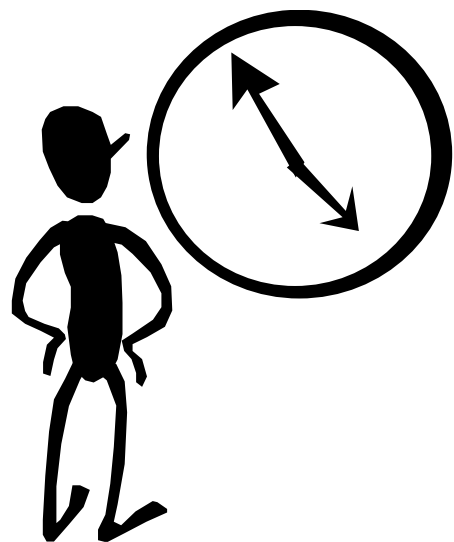
How to manage my time and my tasks well at work

Time management is about planning and managing the time spent on your tasks then checking on this plan regularly to see if you had done what was planned.

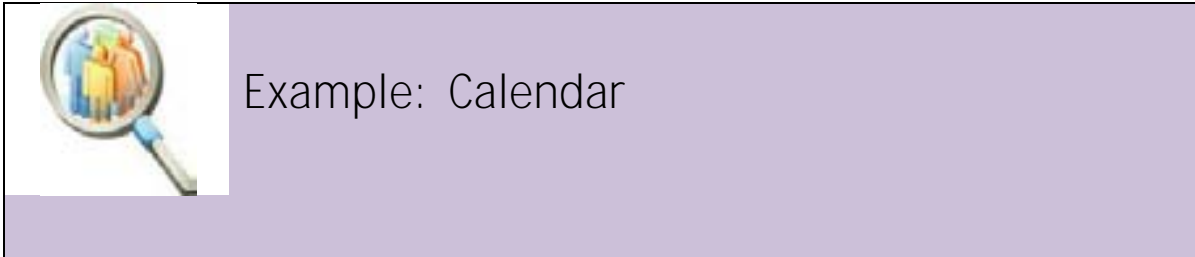
To help you manage time better you can use:

- Calendar for planning
- Create a work breakdown or
- A roster

Calendar for Planning



All the activities on your project plan need to be put on a calendar. This should be put in a place where all staff can see it, and it should be checked regularly at meetings to see that tasks are being done according to the plan.



March 2008						
Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun	
					1 March	
					2	
3	4	5	6	7	8	
Set up meetings with schools			Visit potential schools			
					9	
10	11	12	13	14	15	
Do presentations at schools and clinics about project						
		Sign agreement with school			16	
					17	
Have meeting with interested volunteers		Meeting Seed for Life about training		Meeting with chosen volunteers		22
					23	
24	25	26	27	28	29	
Organise transport		Price equipment and supplies		Buy fencing		
Set up training dates						
Set up venue						30
					31	
Fence Garden						

Using different colours for different activities and showing what activity you are focusing on for what week/ month will also help make things easy to see.

Remember to include items on your calendar like:



- Team Meetings
- Funding Deadlines
- Supervision times for staff/ volunteers



Important thought

The example of a calendar above comes from the computer, but you may also draw your own calendar or you can buy a calendar at the stationery shop. Some businesses or banks also give big calendars away as gifts.

Creating work plans

Just like when you did the project plan, you need to brainstorm all the jobs that need to be done, the dates by when they need to be done and the names of the people who will do them. Then you need to prioritise – what is the most important, to do first, and in what order should they be done (scheduling).

Step 1: Write down all the tasks that are needed to complete an activity

Step 2: Make the most important ones, a special colour

Step 3: Put them in order – what needs to be done first

Step 4: Put names next to each task – who will do what

Step 5: Write them into a work breakdown structure (see next page)



Case study: Work plan

Starting a food garden

Case study: Starting a food garden			
Month: April			
Task or activity	By when	By who	Done
Get a site for the food garden and get permission to use the site			
<ul style="list-style-type: none"> • Make a list of schools in the area 			
<ul style="list-style-type: none"> • Call all the schools to see if they are interested, if yes , set date for visit 			
<ul style="list-style-type: none"> • Visit the schools to check site 			
<ul style="list-style-type: none"> • Choose a school 			
<ul style="list-style-type: none"> • Draw up agreement and get it signed by principal and chairperson of Board 			
<ul style="list-style-type: none"> • Sign agreement 			
Identify volunteers/beneficiaries to work in garden			
<ul style="list-style-type: none"> • Call clinic, churches and schools to tell them about project 			
<ul style="list-style-type: none"> • Do presentation to different groups 			



• Find out who will be interested to volunteer to work in the garden			
• Meet with interested volunteers			
• Get volunteers to fill in volunteer membership form			
• Choose about 20 volunteers and have meeting to introduce the project			
Buy equipment and garden supplies			
• Get prices for equipment and seeds			
• Work out budget			
• Buy equipment and seeds according to budget			
Make the food garden			
• Run workshop with volunteers on how to start a food garden			
• Get volunteers together to dig the site and prepare the soil for the food garden			
• Plant the seeds			
• Work out roster for looking after the food garden			





Important thought

Remember that it doesn't help to have a good work breakdown or calendar, if you don't stick to it!!

Rosters



Definition

A roster is a timetable of activities that happen on a regular basis.





Example: Roster

Roster for Maintenance of the gardening project

	Monday	Tuesday	Wednesday	Thursday	Friday
Morning	Water plants (Thembi)	Water plants (Xolani)	Water plants (Thembi)	Water plants (Xolani)	Water plants (Thembi)
	Weeding (Thembi)			Weeding (Xolani)	Add compost (Thembi)
Afternoon		Do teaching and planting with school kids (Sipho)		Harvest the veggies (Ana)	Take veggies to the school or clinic for sale (Nelson)
	Fertilizer (Ana)				
	Lock up (Nelson)	Lock up (Nelson)	Lock up (Nelson)	Lock up (Nelson)	Lock up (Nelson)



Methods to manage tasks better



There are also some methods that can help you to manage your tasks better, such as:

- To-do-lists
- Checklist of activities



Example: Checklist

Date	Activity	Done



Self-test

You should be able to:

- Identify and use basic time management tools e.g. calendar, time tables or diaries
- Describe and use methods to manage tasks better e.g. to-do lists, checklists etc.

Please ask your facilitator if you are unsure of any of the above.



KEEPING RECORDS OF OUR WORK

Which documents should we keep in our organisation?



Case study

The Lighthouse shelter for children in Umlazi was getting ready for a visit by the Durban Municipality who is one of their funders. The funder had sent them a letter to say that they were coming to look at their office and all the documents that they have in the office. They realised that they needed to look professional when their visitors arrive and so they decided to look at all the documents that they have in the organisation. The chairperson of the Board and the project coordinator, got together to make a list of all the documents that needed to be there so that the funder could see that their organisation ran properly. These documents are also important for legal purposes.

There are a number of other records that need to be kept in your organisation:

- Volunteer record – hours worked
- Register of number of clients seen by Home-based care volunteers
- Attendance registers for workshops held - for monitoring and evaluation purposes of project



activities

- Correspondence - incoming and outgoing
- Staff records – **copy of ID document, drivers’ licence, contact information, employment contract**
- Record of Board members - copy of ID document, contact information
- Other records may include:
 - Register for telephone calls made
 - Register for photocopies
 - Register of messages taken on phone

The legal requirements in terms of keeping different types of documents vary according to the type of document. For CBOs some of the legal requirements are linked to the NPO Act.

Document	Period to be kept
• Accounting and Financial documents	• 5 years
• Constitution	• For as long as the organisation exists
• NPO registration form	• For as long as the organisation exists
• Funding proposals and agreements with funders	• For the duration of funding period and 5 years thereafter (part of Financial records)
• List of clients	• Updated every year, previous 2 years kept, then filed in the archive
• List of Board members	• Updated after each AGM, previous 2 years kept, then filed in the archive



• Staff records	• For the duration of their employment and project
• Minutes of meetings	• For 2 year period and then filed in the archive
• Internal policies and procedures	• For as long as the organisation exists, but updated regularly as the need arises
• Correspondence – incoming and outgoing	• 2 year period and then filed in the archive
• Monitoring and evaluation information	• For the duration of project and funding, then filed in the archive
• Reports: Monthly reports to funders	• For the duration of funding period and 5 years thereafter
• Reports: Quarterly reports	• 5 years , then filed in archive
• Reports: Annual reports	• For as long as the organisation exists



Definition: Archive

An archive is a place where documents, older than 5 years are kept indefinitely. An archive works like a library and one can use the archive to find old information about a specific topic or organisation.

Keeping good minutes of meetings

Effective meetings are a very important part of running your organisation well. Good minutes can contribute to relevant and accurate information being available.

Let's look at an example of minutes of a meeting:



Example: Minutes of meeting

Date: _____ Venue: _____

Time Meeting Starts: _____ Time Meeting Ends: _____

1. Attendees: *Attach signed attendance register*
2. Apologies: *Make a list of people who apologised that they could not attend the meeting*

3. Minutes of the last meeting: *Distributed and accepted as a true reflection of the meeting*

This is the minutes of the previous meeting with all the decisions taken at the meeting as well as the tasks that people were given to report on at this meeting.

4. Matters arising: *These are issues discussed from the previous minutes that still need to be followed up or completed. There may be feedback about certain issues or a report back on activities.*



5. New matters: *All the new items that need to be discussed in this meeting*

Topics according to agenda	Discussion	Decision or action
Topic 1		
Topic 2		
Topic 3		

6. Summary of actions: *A summary of who must do what for the next meeting*

Follow-up on topic	What still needs to be done	By whom	By when



Date, time and venue of next meeting: _____

Minutes taken by:

Minute taker name	Signature	Date

Signed off by:

Chairperson name	Signature	Date

Minutes are also helpful for new members of the organisation to get an insight into the history and previous agreements of the organisation. All minutes should be kept in a central place in the office. You can put all your minutes in a file or in a book.

If your organisation is registered in terms of the NPO Act, the keeping of minutes is a legal requirement.



Self-test

You should be able to:

- Keep accurate minutes of meetings
- Provide examples of relevant records that should be kept

Please ask your facilitator if you are unsure of any of the above.

A BASIC FILING SYSTEM FOR THE OFFICE

One of the important aspects of a good administration system is having a good filing system. The filing system will help to keep the office neat and organised, as well as make it easier to find documents when you need them.

A basic filing system

For your organisation to run effectively, it is important to be able to find information when you need it. A basic administration system for a small CBO might require limited files e.g. 2 or 3; a few if any.



Definition

A filing system stores information and allows you to find the information easily when you need it.

Letters, reports and important documents need to be kept in a place where anyone can find them if they need them. This is why it is important to have a good filing system.





Example of categories for filing

The main categories for a filing system could be:

- Administration
- Legal information
- The Board
- AGM
- Other meetings
- Finances
- Donors / Funders
- Programme information
- Partnership information





Examples of different files

- Coloured paper files
- Ring-bind files
- Hanging files for filing cabinet
- Computer filing



Examples of different methods of labelling

- Different colour labels
- Labels with categories
- Alphabetical labels



Individual activity: Homework

1. Do you have any files in your organisation at the moment?
2. Divide the files into the different categories that you have chosen.
3. Choose the type of file and labels that you want to use for your filing system.



USEFUL WORDS

Administration	The administration of the organisation has to do with all the daily tasks and office functions of the organisation.
Agenda	An agenda is a “programme” for the meeting and is very important to ensure the purpose and desired outcomes of the meeting are reached. The agenda is a set format that needs to be followed so that the meeting takes place in an orderly manner and all points are covered.
Checklist	A checklist is a quick way to make sure that you have done all the tasks you have set out to do for a specific activity or project.
Daily planner	Is a sheet that will help you plan all the activities and tasks for that day.
Filing system	Stores information and allows you to find the information again when you need it.
Minutes	Are a written record of the proceedings of a meeting and captures the decisions taken and future tasks that need to be carried out, as well as who is responsible.
Reception	Is the first place where people from outside the organisation make contact with your organisation. At reception, you welcome and direct visitors and clients to the right person in the organisation.



Time management	Good time management is the ability to manage your day in such a way that you are able to achieve all tasks that you have planned for that day, as well as to have a good balance between work, free time, sleep and personal time.
To-do-list	A list of everything you need to do on a specific day.
Weekly planner	A plan for each day of the week that will show what needs to be done each day.



The learning materials for Development Practice and Management were specifically designed to complement and give substance to the competence standards drafted with the assistance of community based development practitioners in South Africa. It is envisaged that practitioners, capacity builders, grant-makers and others will use these standards and learning materials, improve them and in turn share their learning with others via www.developmentpractice.org.za.

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