ORGANISATIONAL DEVELOPMENT

At the end of this section you will have:

- A better understanding of IkamvaYouth's organisational structures and procedures that assist the delivery of a high quality tutoring programme
- Been introduced to a variety of templates and examples to help build your own organisational structure and processes
- Gained understanding to grow and strengthen your tutoring programme

Running a successful tutoring programme is a full-time job. Although you can start by volunteering your time to coordinate tutoring sessions after-school and on Saturday mornings you will find that as your learner numbers increase, you take on a matric cohort, and you want to add additional programmes, it will be necessary to build the awareness of your organisation, access funding, implement financial management, and have quality Monitoring & Evaluation (M&E) processes. At this stage it is important to have human resources that you can rely upon.

Note

It is advised that you get your tutoring sessions operating effectively before you start seeking fundraising, developing chartered accounts or implementing an M&E process.

This section speaks to any level of organisational development and outlines the basics of establishing and running an effective organisation. It is divided into the following sections:

1) Governance
2) Project planning and management
3) HR
4) Fundraising and sustainability
5) Financial Management

GOVERNANCE

The first step is organisational establishment. Once you have a venue for your tutoring programme with learners and tutors attending and the programme has been successfully running for a few months or years you must officially establish it as an NPO or partner with an existing NPO where you operate as a programme of the organisation, and are held to its governance, accounting and human resource processes and policies.

Inyathelo is an organisation that exists to help NGOs. There is some information on their *website* regarding registration and they hold open and free NGO clinics.

Once registered, you are in a position to begin building your organisation into a highly efficient and effective system that provides the best service for the young people that you work with.

Democratic Decision-making

IkamvaYouth is a democratically-run organisation. When it was established, in 2003, the organisation adopted a clear democratic approach to management through committees, which has developed over time. Widening the participation in key decisions has a profound effect on the individual's commitment to the programme, whether one is a staff member or a learner. Inclusion maximises the ownership of the choices made, and therefore the stability and sustainability of the decisions that have been taken.

Establish a Board

To register as a non-profit or non-governmental organisation (NGO) it is required by law to have a board. However, you mustn't look at establishing a Board of Directors as merely a legislative task. A well-appointed and informed board can add huge value to your organisation.

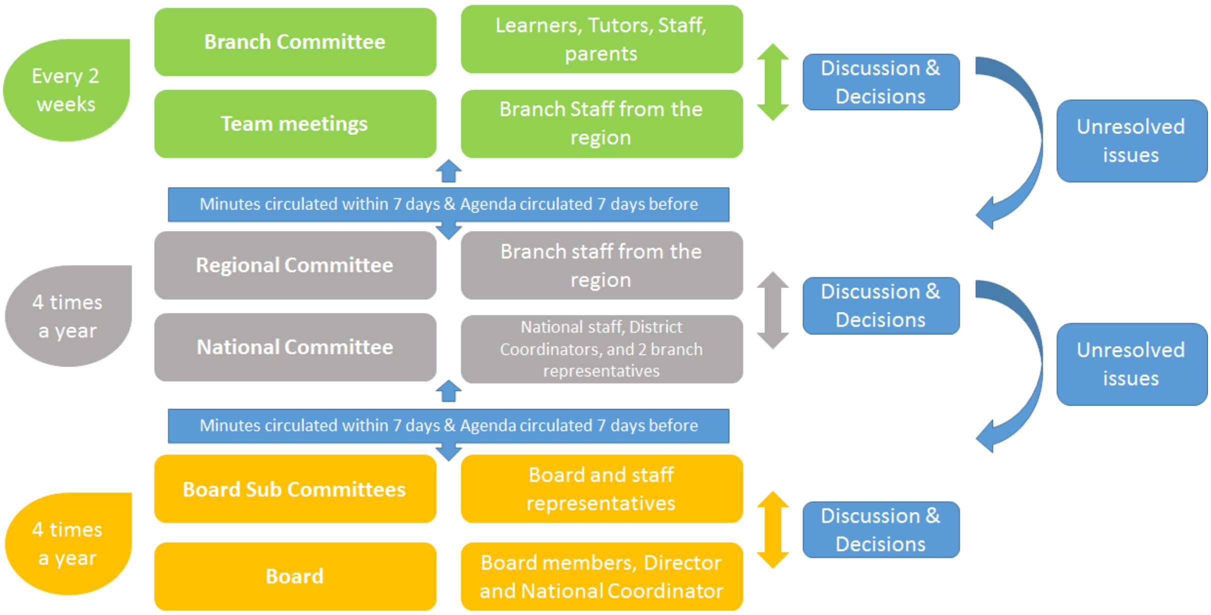
The primary duty of a board is to govern the organisation's well-being. They do this by ensuring that all stakeholders of the organisation; including staff and beneficiaries, are looked after. They can offer legal, ethical, and practical guidance that enables the organisation to do things in the 'best way' and ensure that unnecessary risks are not taken. Your board can help with practical guidance and resources as well. For instance they may help with policy development, fundraising or connect you to training and development opportunities.

Manage by Committee

Initially the organisation was managed by a branch committee alone. As the organisation has grown it has not been possible to involve everyone in just one committee. Therefore structured committees have been put in place at the branch, regional, and national level. These committees talk to each other through a scheduled system of meetings, minutes, agendas, and feedback loops effected through online surveys.

Tip

Establish systems early. Put in place organisational structures as soon as you can. As you grow and develop it is important to have some backbone systems in place that will make your growth much easier.



Each branch has a branch committee (Branchcom), which comprises the two paid employees (branch coordinator and assistant) and the most committed volunteers, learners, teachers and parents (if you're lucky!). These committees meet every two weeks. The agenda for this meeting will be informed by the learner representatives at a branch level and from team meetings and regional committees. The idea is to reach a consensus so that a decision can be taken that is agreed upon and has the buy-in of all members. However a voting system can also adopted, with each member having an equal vote.

If after voting, Branchcom are unable to reach a decision, the issue will be taken to a discussion at the team meeting which is scheduled for alternate weeks to the Branchcom. The team meeting comprises branch staff from that region. The discussion will continue until a consensus is reached. If the decision will have organisational repercussions or if there is serious contention that is preventing a decision it can be taken to the Regional Committee (Regcom)

This Regcom meets every quarter throughout the year and consists of the same members as the team meeting. The difference being that the agenda is formally informed by National Committee (Natcom), as well as any unresolved issues from Branchom/team meetings. The Natcom consists of all national staff, District Coordinators and branch representatives. They meet 4 times a year, including twice in person. Between the Regcom and Natcom a consensus can usually be reached that is representative of the entire organisation.

When a decision or issue is raised and particularly when it presents a potential risk to the organisation, the discussion will be taken to the Board Sub Committees (Subcom). There are three Subcoms: Sustainability, Audit& Risk, and HR & Governance. They consist of representatives from the board and staff and aim to catch and address issues of potential threats before issues are taken to the Board. They also offer a level of expertise that can assist staff to make better decisions for the organisation.

All minutes are shared from all committee meetings, except for Subcoms as these matters can contain sensitive information. Due to these transparent and democratic governance structures and a highly informed team, responsibility and information is disseminated and distributed amongst staff fairly. No one person holds all essential information so changes in the management team will not threaten programme delivery. Decision-making is also decentralised as a result of these structures which not only equips staff to make choices in the branches best interests but also shares the duty of making the more difficult and contentious decisions.

Note

There are other systems to establish a democratic management system. Whichever way you choose to do so, IT IS EXCEPTIONALLY IMPORTANT. The involvement of ALL in the operations is one of the keys to the success of the programme and ultimately its impact.

Communicate

Communication is such an important aspect of organisational functioning and even more so when adopting a democratic approach that relies upon people being well-informed to make choices.

In addition to the committee meetings it is vital to ensure that everyone hears and is heard at all times. It is important to put in place the following systems for communication:

Google group email. It is also good practice to CC your colleagues or support team on matters that concern them. This allows everyone to be involved in what is going on as it happens. Check out this *very simple explainer* that will help you to establish your email list.

Have a look at these *really useful tips for email copy*.

Google Calendar. Everyone needs to know what is happening and when people can plan and get involved. Depending on the size of your organisation you may want to include just staff or staff and volunteers as well. You can set up different calendars for different people or different projects. You can find some online support regarding setting up and using your Google calendar *here.*

Google Drive. This online collaboration platform lets you upload and create documents that can be worked on by numerous people in various places at the same time. It is great if you are developing a fundraising proposal or formal document and want other input. It also means that there is one version being worked on rather than multiple versions of the same document circulating. *Check out this overview video.*

PROJECT PLANNING AND MANAGEMENT

Project planning and management is a broad topic area. Good planning is essential in order to get where you want to go. You will need to plan regularly throughout the year, on an individual level and organisational level.

Theory of Change (TOC)

Before you can plan what it is you are going to do you need to know why you are doing it and what impact you are hoping to achieve. The TOC helps you to create a causal link between what it is that you want to achieve i.e. your ultimate outcome, short and long term indicators of change, and the activities that you will undertake (outputs) and the resources needed to make these happen (inputs).

There are various ways to work through your Theory of Change. The important thing is to do it as a group so that your whole team is working for the same thing and can see every activity as a step towards a larger goal. You can find numerous resources online that will help guide you through the process. Have a look at IkamvaYouth's TOC as well to give you some ideas.

Resources/Templates – IkamvaYouth's Theory of Change

Strategic Planning

This involves all levels of the organisation and tries to distinguish the collective goals and how you will achieve them. The outcome of strategic planning is a series of SMART objectives that help to guide the organisation's direction.

SMART objectives ensure that your goals are:

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

e.g. Not SMART: Improve pass rate in Western Cape.

SMART: In January 2016 IkamvaYouth will have achieved a 100% matric pass rate in at least one Western Cape branch.

Individual planning

Overarching organisational objectives act as the compass but it is your responsibility to steer the ship. You need to put in place a plan that is workable for you. A plan is useless unless you are able to execute it!

A planning process that many organisations have found useful is the idea of framing planning as a ”Why?”, “What?”, and “How?” process.

<u>The Why?”</u>

What is the outcome or result you are trying to achieve *e.g. retaining volunteers*

<u>The “What?”</u>

What are the five steps you need to get right to produce the result?

e.g.

- *Deliver a quality training*
- *Implement a consistent schedule*
- *Communicate regularly*
- *Involve volunteers in the decision-making*
- *Appreciate and acknowledge their input and value*

<u>The “How?”</u>

How can you actually achieve these 5 points? What 3 steps can you do tomorrow to work towards each?

e.g. Deliver a quality training

1) Set a date for training and communicate this well ahead of time to current and prospective tutors

2) Download the 'How to run a tutor training session' and adapt it accordingly
3) Make a list of what is needed on the day - flip chart paper, pens, chairs, food, drinks, printed materials. Make sure you have everything sorted a week before the event.

By breaking down the objective into bite-sized chunks you will actually be able to take action on your plans. Quality planning and action takes discipline as you need to hold yourself and each other accountable. At the early stages of your programme, no one else will. If you want to make things happen it is your responsibility to make them do so!

Bear in mind that there are many different methods of project planning and management. The important thing is to find a method that works for you. This method encourages you to reflect on your actions and whether or not they have been successful. Were they completed? If not why not? What needs to be in place so that they can be completed? It is during the check phase that you hold yourself accountable to your plan and you can refine the plan during the 'act' stage to produce a new result.

Try not to view planning and management as an additional activity you have to do on top of your increasing workload, but rather see it as a method of making you as a coordinator more efficient and effective and in this way improving the quality of your programme and its results.

Tip

Set aside a couple of hours every week to look at what you need to do and how you are going to do it. Make a 'To do list' for the week, prioritise this list by numbering, and as you go tick off those that you complete. This is a good method as you will be able to reflect at the end of the week and see what it is you have achieved - something we too often forget to do.

Planning for 'Scale'

As your programme develops you may be in a position to consider setting up another programme at a different school or in a different area. If you find yourself in this position and can see a way of 'scaling' growing your activities it makes sense to seize these opportunities. However, there are some questions that need to be considered beforehand:

- What is my purpose for expanding?
- Does this align with the organisation's vision and values?
- Is there learner demand?
- Have I got buy-in from stakeholders; principals, teachers, community leaders etc.?
- Is my whole organisation supportive of this choice?
- Have we got the human resource capacity to support another programme?
- Have we got the budget to support an additional programme?
- Can it be done, logistically and practically? E.g. days of the week, times, geographic location and transport, resources etc.
- Is it safe for learners to be walking to and from the proposed programme site?

There are many questions and considerations and you can choose the questions that work best for you. Making time for these considerations before jumping head first into a new project is essential. A simple planning meeting with your core team would allow you to work through these questions and to collectively decide if and how you can go about 'scaling'.

HUMAN RESOURCES

A team is only really as good as each individual player. The first step to creating a dynamic team is hiring the right people. This can be easier said than done. One of the best ways of recruiting is through your existing network of volunteers. People who have given their time, understand the organisation, and share your values are ultimately the best people for the job.

If you don't have this option, here are a couple of tips to recruiting the right people - your programme will need a Coordinator initially. It is suggested that by the time you have 80-100 learners on your programme you will need to recruit an assistant.

You may feel that the coordinator (you) can handle that many learners on your own. The reality is that you probably could turn up when you say you will and recruit a few volunteers to help and run a programme. However, if you want to deliver a quality programme that has the desired impact on the learners, it is important to build your organisation's capacity to support them effectively.

Volunteers

When you first start your programme it is likely that you will be volunteering your time and you will be working with volunteers. However, it is still important to put some systems in place to ensure the smooth management of your human resources.

Think about HR management as a process of you enabling others to perform at their best and therefore deliver a good quality programme. If you are able to find a way to motivate, nurture and retain great people, you will also alleviate any one person carrying all the responsibility.

Keep an eye out for volunteers who are highly committed and are good at tutoring. Acknowledge it, and ask if they are willing to take on more responsibility. You will find some volunteers really want to get involved, while others can be honest and say they would rather stick with tutoring.

Gradually you will build a team of dedicated individuals around you, who can hold the programme in your/staff absence. You will find that some of the most committed volunteers may be in a position to become formal employees if your organisation is able to develop to this stage. Hiring people who you already know and trust, *and* that have a good understanding of the model and what you do will increase service quality and ease of management.

Note

When hiring friends and longstanding volunteers who you trust, make sure you still consider their suitability for the role. **Are they the best person for the job?**

Some funders will want to see that you have thoroughly thought through the recruitment process and have picked the best person for the job.

However, it is also important to follow a process of recruitment and put proper management structures in place that will allow them to perform at their best. See management as a tool to get the best from your employees and ultimately for your programme, rather than a disciplinary role.

Recruit

As soon as it is possible, you should look to hire a full-time person. Although tutoring sessions may only happen 3 times a week, to really deliver a quality programme there is a lot of background work that unfortunately can be quite time consuming. Calling parents, managing the relationships with stakeholders, collecting reports, managing volunteers, coordinating events, etc. etc. requires a dedicated human resource.

An organisation will normally recruit a Coordinator and an Assistant initially. IkamvaYouth branches have a Branch Coordinator and a Branch Assistant for between 80 – 180 learners. One person can usually manage a small group of learners but as soon as you are over 80 you will want to look for an additional resource.

You can find the job descriptions for each of these posts, which will give you some idea around how to construct your own job descriptions. These can be advertised using a more simplified job advert. This will be less detailed than the job description. *NGO Pulse* and *Bizcommunity* are recommended sites on which to advertise online.

Example job advert can be found *here.*

It is often better to hire locally and so as well as online adverts it is important to put up adverts in local places and appeal to your tutor and stakeholder networks.

Resources/Templates: Branch Coordinator Job description

Interview

Once applications come in, you could use an Excel spreadsheet to record the main information about each category and could use a rating system as you go so that you get a sense quickly of who the 'top' candidates are.

It is good practice to shortlist candidates. Aim for 4/5. Schedule an interview with each of the candidates, ideally in person. IkamvaYouth interviews *and* assesses candidates. Assessments are conducted to test for writing ability, familiarisation with Excel, and critical thinking. This is usually sat as part of the interview so they can ask questions for clarity and you can be sure that they are the ones completing the assessment, and do so within the allocated time.

It is important to include as many different 'groups' as possible in the interview. Invite a Branchcom learner, a committed volunteer, and other key members of the management team.

Resource/Template: Branch Coordinator Assessment and Budget

Managing staff is a whole other job in itself. If your organisation is at the early stages of development you shouldn't need to manage too many people. However, if you plan for your organisation to grow it does help to put in place certain performance management mechanisms that will reduce the risk to your programme.

Employ

Once you have selected the right person for the job it is a good idea to draw up a contract so that everyone is clear about the expectations etc. Things to consider to put into a contract are; working hours, salary and pay days, sick leave, leave, notice period.

Resource/Template: Sample contract

Manage Performance

Any staff member when hired is put on a 3 month probation. They receive a specific contract for this period of time. This protects you against poor performing staff. If you offer a permanent contract from the first instance it can get very complicated to dismiss someone who is underperforming.

At the end of the 3 months a performance review is conducted and if satisfied a permanent contract will be offered. Performance must still be managed after this period carefully and you need to have systems in place that allow you to identify and support the employee if they are not performing well and ultimately to dismiss them if performance does not improve. IkamvaYouth follows a disciplinary process to this effect. As long as your process is communicated clearly to the employee upfront and know the expectations of their role, this shouldn't be a surprise if it comes to this – it is hoped you can intervene beforehand.

Resources/Templates: Example Employment Contract Template, Performance Review template, Disciplinary process

Retain

As your organisation grows there may be room to offer career progression to your employees. Painting a pathway from an early stage can help you to retain talented and dedicated staff. Often people would like to progress in their careers and learn and develop themselves. You can do this by meeting with them and finding out their career aspirations and helping them to understand whether there is opportunities within the organisation to accomplish these goals and to put a plan in place to achieve this.

All organisations will be different but you can have a look at an example progression. The important thing is to communicate with your employee and find out about their motivations, what drives them, and then help to offer what they want and need.

It is also important to put in place basic policies that maintain the well-being of your staff. The most fundamental policy is a Leave Policy. You can have a look at IkamvaYouth's leave policy to help draft your own. Other policies that have been put in place as the organisation has grown are a study assistance policy that encourages people to learn more and develop their skills in line with their career progression and per diem policy which protects staff when they are traveling for work.

Please ask IkamvaYouth if you would like any information on our other policies.

Resource/Template: Leave Policy

FUNDRAISING AND SUSTAINABILITY

It is essential that you begin looking at the sustainability of your organisation from as early as possible. When working with young people you want to be assured that the programme can continue to provide the service to the learners who need it.

One aspect of sustainability is fundraising but there are also other activities that can increase the stability and long-term security of your programme. This section is split into:

- Fundraising (sources/types/activities)
- Reporting
- Monitoring & Evaluation (M&E)
- Marketing and Awareness

Tip

Start collecting data early. As soon as you start your programme think about what information will show whether or not your programme is working and then make sure you have access to this information. It is also a good idea to put a structure in place i.e. the last week of every term is used to consolidate the branch report and look for any patterns of progression

All the activities spoken about here are all connected and tend to feed into each other. For example getting good reporting in place and therefore having a good idea whether your programme is having a positive impact on your learners, allows you to communicate and raise awareness about the programme and engage more learners, volunteers and funders.

Fundraising

Fundraising is one of the hardest parts of working in the non-profit sector, particularly when you first start out. It does get easier to attract funding as you demonstrate impact and grow your learner numbers, however you then have to raise more funds to support the work! Therefore fundraising is always on the agenda! There are different methods and means of acquiring funding and it will depend on what you need funds for.

Some key facts to remember as you embark upon your fundraising journey are:

- Fundraising is about people not money
- Fundraising is about relationships
- Globally 80% of donations are from individuals and 20% are from other sources.
- A donor is **FOUR** times more likely to donate again if they receive a THANK YOU within 48 hours.
- A donor is much more likely to donate to a NGO who shares the same values and vision as he or she does.

Types of funding

The two main types of funding are donations and grants. You will likely receive your first funding in the form of a donation. The donation of funds or resources and materials is useful for once-off projects. If there is a specific and quantifiable need it is much easier to approach people and ask directly.

It is worth sitting with your team to answer a few questions:

- What are our core needs? Money and resources? (Be specific!)
- What are the businesses in my immediate surroundings?
- Do any of the volunteers work for companies that could give?
- Does anyone know anyone at larger companies?

Approaching companies can be difficult. It can be embarrassing to ask for money and you could feel that you are inconveniencing someone. However, research has shown that the vast majority of the world actually do want to give but are not sure where and how. You are doing them a favour. Rather than persuade them to give, you just have to *let* them to give to you!

Other than local businesses there are organisations such as the Rotary group, an international network of people who are often keen to contribute. They have a preference for the donation of actual assets or food rather than money.

You could also consider making an email appeal. This can only be done every so often and usually works best in response to a crisis or emergency.

Grant funding is usually from a trust or foundation, or increasingly from corporate social investment departments. A grant comes with an agreement between you and the grantor that the money will be

Note

Be careful when accepting grants that the deliverables that you agree upon are attainable. Do not promise a trust that their funding will lead to all 20 of your matrics receiving a Bachelors pass. Obviously you want that and will aim for that but set more realistic targets in funding conditions.

spent on something specific and there may be certain deliverables that must be met.

Tip

Not all money is good money! Just because someone offers you money it does not mean you have to take it. Consider the reason for giving, value alignment, and the expectations of the funder before diving into a grant.

Most funding organisations do not accept random proposals. It is therefore important to be on the constant look out for possible funding opportunities. You can check sites such as NGO Pulse and Funds for NGOs.

It is also important to build relationships with anyone that could be a potential funder or link to a funder. A trusted recommendation goes a long way in the non-profit sector.

Proposal Writing

The next step is to nail the proposal.

Before starting any proposal familiarise yourself with the donor and their interests. Are you a good fit? Are you working in their area of interest? Do you meet their eligibility requirements?

Tip

When you first begin working on the application, check the requirements for additional documentation, reference letters, etc. When letters are required, provide referees with at least a week to provide them.

Tip

Put aside **a LOT of time**. Proposals always take a whole lot longer than you'd expect, even when you're an experienced proposal writer. If you're new to proposal writing, or are writing for a project that hasn't yet been funded, then you need to start working on it at least **two months in advance of the deadline.**

Research possible funding opportunities; NGO Pulse and FundsforNGOs are a good place to start

Read the entire website and familiarise yourself with projects they've funded before (speak to any organisations that you know or who are in the same field as you), the average grant they generally give to first-time grantees, the process, the application form, the requisite supplementary documentation etc

Hold a brainstorming session with your team to decide what amount you are asking for, what it will be used for and why you have chosen this i.e. intended impact.

If possible try to speak directly to the funder to determine whether you should apply. Go to the funder with a clear idea of what you wish to use the grant for.

Draft a proposal, make sure that you are within the word limit and that each piece of the proposal speaks to each other (e.g. the concept or overview, the budget and the full proposal). Read through the proposal and imagine the questions which a reader who knows nothing about your organisation would ask, and then ensure that each of these are explained.

Get input from an experienced proposal writer. .

Re-draft (you may end up doing several drafts before feeling totally satisfied with the proposal). If possible get a couple of people to do a last eyes edit to pick up grammar mistakes etc.

Many proposals will have word limits. The following tips help with meeting word limits:

- Take out all repetition (both within sections and across the entire application overall).
- Set up acronyms early on and then use throughout the rest of the application.
- Add a field in your proposal or relevant section where you point to the word or character count. This helps you to constantly work towards the word limit goal, and is very helpful when working on proposals collaboratively.

A good proposal will consist of the following:

1. **Introduction:** The introduction needs to be compelling. The first sentence needs to really grab attention. Remember your proposal is one of 1000s hitting the desks of grant-makers and you need to make them remember it (and want to read it all the way to the end). The introduction needs to introduce your organisation and illustrate as concisely as possible what you do, the way you do it and your impact. Outline what you're asking for and why; how much you need, and what you're going to do with it.
2. **Problem statement:** By reading the grant-makers' website, you'll get a sense of the extent to which they are likely to understand your context. For those who do little work in South African education, you need to educate them on the issues with facts and stats. Reference literature briefly for the most compelling stats.
3. **Outputs and Outcomes:** Once you've explained why you do what you do and how, you need to show the actual activities and results of these.
   Outputs are essentially your activities: numbers of tutoring sessions, number of workshops, numbers of learners participating, attendance results etc. This will speak directly to the budget, showing how you will spend the money.

   Outcomes are the results of these activities: academic improvement, increased eligibility for quality post-school opportunities, access to tertiary and employment. This will speak to the problem statement showing how what we do will address the challenges.

There are some good resources online that offer you tips and ideas about how to write a good proposal. There are also NGO fundraising courses that you can register for.

To recap on some key points:

- Don’t waste time on applications for which we are not eligible.
- Don’t send generic proposals to donors; it's the equivalent of sending generic cover letters when applying for a job.
- Don’t send an unfinished / unpolished version for last-eyes edit.
- Never leave it until the last minute!

Reporting

Unfortunately your job is not over yet. In fact, once the money is in your account and the agreement is signed, the hard work really begins! You now have to spend the money and report against it. This is easier said than done.

Narrative Report

Reporting is a skill in itself. Some funders will provide a template however some will only give you vague guidelines.

- Begin with a summary of activities against the proposal you submitted. Testimonials are a good way to demonstrate activities and the impact that they have.
- Elaborate upon your programme delivery/outputs and detail the lessons learnt -both those resulting from successes *and* failures.
- Look at what you have learnt and suggest clear ways forward (particularly if you are providing a mid-grant report). Outline how you are going to rectify a situation if something has not gone to plan, and how you will ensure the continuation of more successful activities.

The key is to find a way to be open and honest without alarming funders. The last thing a funder wants to read is a negative defeatist report but nor do they want to read a shining report of success that when researched is a fabrication of the truth!

Tip

Write with a genuine voice. Pretend that you are speaking to the funder and you are trying to explain and describe what you have done, what you have learnt and what you will do. Sincerity will come across in the tone of your report.

Note

If you are worried that you will not meet the funding deliverables or something has gone severely wrong with your programme during the funding period SPEAK TO THE FUNDER ASAP. A good funder understands the reality and will not hold you to something that you cannot achieve, particularly when it is outside of your control. BE HONEST.

Tip

Log the reporting deadlines in your Google Calendar, set a reminder 2 weeks beforehand to start looking at the reporting template.

Financial Reporting

While donors need to know the social returns on their investments (the outputs and outcomes of the project, programme or branch that they're funding), they also need to know exactly how you spent their money.

While we aim to budget as effectively as possible using line item amounts, the reality is that there are (both positive and negative) unexpected events. This will often cause you to spend more or less than originally intended. In either of these scenarios, you need to inform the donor upfront. If you have unspent funding you should present a plan for how you would like to re-route the funding; either to cover expenses that have ended up being higher than that you indicated in your proposal, or to cover new line items. It's important to get the donor's permission to spend funding that was allocated to specific line items in your budget.

Many donors have their own templates for the financial sections of their reports. Where donors do not have templates, follow these steps when reporting:

- Report against each line item as featured in the original proposal
- When you have over or under-spent by more than 10%, you need to include a note or comment explaining the reasons for this. (Note that some donors have different % requirements; refer to the grant agreements for these).
- Where you have reallocated unspent funds, you need to explain what these were for.

Monitoring and Evaluation (M&E)

Reporting on programme implementation is an important aspect of any organisation. It helps you to identify areas of weakness and strength, put in place solutions, and monitor the impact of these solutions. It will ultimately lead to a better quality programme that will achieve more impact. Having data readily available will also dramatically increase the ease of your fundraising efforts.

When your organisation is young, you will probably not have anyone demanding a report from you. Once established, the Board can play this role and will help to enforce deadlines on your reporting process. In the absence of a demand, it is tempting to neglect reporting in preference for actual programme implementation. However, remember that without good reporting you won't be able to demonstrate impact or improve your programme and you won't be able to access funding. Ultimately you won't have a programme to implement!

For an introduction to M&E, have a look at this Beginner's Guide produced by one of our funders, the Learning Trust.

IkamvaYouth's reporting system is very simple. Each branch submits a quarterly report to the national team at the end of each term.

Template; Termly Branch Report Template

This report is analysed to ensure that all branches are on track to achieve their strategic goals and objectives. It also provides an opportunity for branches to set goals and monitor their progress. Be sure to carry over goals that are on-going or have not yet been realised. This is a great tool to evaluate staff and programme operation.

Each branch report tracks:

1. **Learner numbers:** If you do not know how many learners are attending tutoring sessions you cannot draw conclusions about pass %, cost per learner, grade progression and drop-out, etc.
2. **Learner attendance:** This must be recorded accurately at every session. The quarterly report will help branches to see what % of their learners are in the various

attendance categories to inform kick-outs. % will have been taken throughout the term and staff will have followed up on low attending learners before reaching this point.

3. **Volunteer numbers and attendance:** IkamvaYouth's most valuable asset is the volunteers who are often ex-learners and community members. To reward volunteer commitment it is important to monitor the attendance of volunteers so that opportunities, bursaries etc. can be suggested to the most deserving candidates.
4. **Report Collection;** the number of reports collected and average scores.
5. **Additional programmes** i.e. computer classes, workshops and Excursions

It is from the collection of this data that you will be able to demonstrate impact. As you progress, it becomes important to be able to demonstrate whether the learners who participated in your programme have been able to improve (i.e. would they have achieved these results without participating in the programme?) This requires longitudinal data, as well as data from feeder schools for comparative purposes. IkamvaYouth is collaborating with a team of education economists on a large-scale evaluation, and in order to participate in this effort, please contact zoe@ikamvayouth.org.

Database

IkamvaYouth has reached a point of organisational growth that requires a more streamlined approach to reporting. It has therefore adopted the use of a centralised database and information management system called Ed-Admin. This system is used by many schools in the country and has been customised for IkamvaYouth's specific needs as an after-school tutoring programme.

If you are interested in using the database for your organisation or would like to find out more about the capabilities and costs please contact marion@ikamvayouth.org.

Marketing and Awareness

As well as internal communication, external communication is also extremely important to raise the profile of your organisation. It is important that the community in which you work is aware of what you do so that you can recruit more learners and volunteers and involve more schools and parents.

However, it is also necessary to raise the awareness of your organisation and specific programmes further afield. The main aim of this is to attract funding and support.

A few ideas that may help you to market your organisation are listed below:

- Design an eye catching logo that is not too text heavy – you could approach design students at universities and colleges or ask your learners to have a go at designing something.
- Make sure that you use this logo in all your external communication so that people start to associate the logo with what you do
- Setup a Facebook group that is clearly named and invite your friends to join. Try to keep this updated with interesting stories, links to articles, photos, and videos, opinions, so that people remain engaged.
- In all external communication try to be as professional as possible; style, language, tone.
- To communicate a surprising or exciting event, a hard hitting story of a learner, a new funder/donor, a new office, an award that is received, etc. it can be useful to send out a press release. Press releases are used to get factual information to media personnel and companies so that they can develop a story from these facts. The aim is to be clear and concise and convey the message as simply as possible. Lead with an attention-grabbing headline, followed by the main facts 'who, what, when, where, how, and why', and try to keep it between 200-500 words. Make sure when you send it out it has your contact name, phone number and email address at the bottom.
    - The best way of marketing your organisation is in person so attempt to organise as many presentations, workshops, visits and Open Days as you can so that

people become aware of what you do. You can write and practice a 'pitch' which includes all the needed information so that you don't waffle.

FINANCIAL MANAGEMENT

Financial management is an integral part of your organisation's growth and sustainability. Without detailed systems in place it is likely that you will struggle to acquire funds, lose information and not be able to quantify your spending, and threaten your (and others) organisational reputation.

But don't panic! Even if you are a finance-phobe, IkamvaYouth have developed some easy to use templates that can help guide you to establish your own systems.

A good financial system will vary from organisation to organisation depending on your specific programme and context. However, there are some fundamental aspects to a good financial system that apply across the board:

- A detailed budget prepared ahead of time
- A system of tracking expenditure against that budget
- A system for recording income and expenditure – record keeping/cashbook
- Regular monitoring and checks

It is never too early to establish good financial practices. There are two overall questions that financial management deals with:

1. When is the money coming in?
2. When are expenses going out?

These two questions form the backbone of your finance system. You need to know what is coming in and when and what your ongoing expenses are. Good financial management will align income and expenditure accurately and efficiently so you will always have money in the bank but not too much just sitting there.

Budget

Your budget must contain all the expenses you think you will need to make over the year. It is a good idea to group these line items for instance; overheads, programme delivery, HR.

Template: Branch Budget Template

Grouping the budget in this way makes it a lot easier to track spending specifically against a line item and will be easier to add codes if you want to move to a chartered accounting system.

It helps to break it down into monthly expenditure so that you can regularly monitor spending. It helps to know how much you budgeted for the month, what has been spent and where you can reallocate if necessary.

It is important not to change the budget once it is set. However you can build a re-forecast, if there are substantial changes you to anticipate to your original plan/budget and related income streams.

Tracking

Your expenses must match the line items on your budget.

If you have one budget that relates to different projects it is a good idea to split your expenses out into the different projects e.g.

Budget line item	Expenses – Tutoring programme	Expenses – Soccer programme
Programme Delivery		
Food		

To consolidate accounts and to compare spending you can create ongoing management accounts that directly compares; what has been spent this month, what is the accumulative total spent so far across the year, and what amount remains under that particular budgeted item. If this is done every month you are unlikely to exceed spending too much in any one area.

Cash Flow

A lot of spending is done with cash at the branches. This is the most common reason an organsation fails to get a successful audit. When an organisation deals with cash it is vulnerable to mistakes. IkamvaYouth has spent years developing a working cashbook that you may find useful if you are dealing with cash in your organisations.

You can find some tips on using the Cash Book in this short *video.*

Template: Cash book template

To briefly walk you through the cash book: the opening balance is the amount that is in the safe at the beginning of the month. This should be checked daily to ensure accurate recording. This is the amount that you can spend in cash and all transactions will be recorded in this table. The main areas for cash expenditure tend to be volunteer reimbursement and food/catering. For all expenses it is important not only to reflect the budgeted line items (that links back to the main budget) but also to describe in detail e.g. tutor's name.

Linked to every cash expense is a receipt, and in the case of tutor reimbursement a list of all tutors is filled in at each tutoring session with the amounts given to the tutors and they sign upon receiving this amount. It is important to break these down as individual rather than a bulk amount to ensure there is no replication and misappropriation of funds.

The receipts are numbered and filed. It is best to number the receipts over a month but to then file and start afresh with the new month. They can be filed electronically or physically.

If you are running multiple projects e.g. tutoring and sport, it is a good idea to hold separate cash books for the different projects.

It is also important to understand cash flow through your organisation and to use this to make cash projections.