

Resource and Sustain a Local Forum

within an ECD context



– MODULE 4 –

ECD FORUM LEADERSHIP PROGRAMME



This skills programme is developed by



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— ECD FORUM LEADERSHIP PROGRAMME —

Module 1: Understanding Community Development within an ECD context

Module 2: Establishing a Local Forum

Module 3: Community Stakeholder Relationships to support Local Forums

Module 4: Resource and Sustain a Local Forum

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SECTION A:

Introduction, overview and structure

“A fundamental concern for others in our individual and community lives would go a long way in making the world the better place we so passionately dreamt of.”

*– Sixth Nelson Mandela Annual Lecture,
Kliptown, Soweto, South Africa, 12 July 2008 –*

1 Welcome

Well done on reaching the *final* module. At the end of this module you will receive your *Assessment and Moderation Pack/Guide* which contains all the information for the *Summative Assessment* and the *Portfolio of Evidence (PoE)*. You will receive and sign a form that provides evidence that you have completed all the learning activities in the four learning guides (Formative Assessment). Welcome to *Module 4*.

2 Learning Programme Outcomes

The learner will be able to:

1. Demonstrate an understanding of an integrated and holistic framework for community development.
2. Identify and explain government policies which have an impact on community development.
3. Work as part of a team to promote a holistic and integrated approach to community development initiatives.
4. Demonstrate knowledge of principles and values that underpin community development.
5. Describe the importance and role of participation in community development.
6. Demonstrate knowledge of the principles of empowerment and social learning.
7. Describe the concept of ownership in relation to community development.
8. Explain community development and the importance of individual participation in developing community.
9. Conduct a situational analysis in a specific community.
10. Reflect on own expertise and skills to inform a personal contribution plan.
11. Design a plan for personal involvement in a specific community project.
12. Identify the structure and purpose of a team.
13. Describe and apply the roles and responsibilities required to work in a team.
14. Identify factors that affect a team in the workplace.
15. Review the effectiveness of a team and own participation in the team.
16. Demonstrate an understanding of project management tools.
17. Use a range of project management tools.

18. Apply corrective action steps where project management tools and techniques usage problems occur.
19. Plan and organise a community development meeting for a specific purpose.
20. Identify and invite participants to the meeting.
21. Plan the work activities of a team.
22. Assess and report on team member performance and issues within the team.
23. Allocate work to team members.
24. Identify resources relevant for specific communities.
25. Determine mechanisms to gather resources that are appropriate for specific communities.
26. Distribute resources according to agreed criteria.

Bear in mind that these learners will apply these skills mostly in an ECD context.

3 Modules of this learning programme







Module 1: Understanding Community Development

Module 2: Establishing a Local Forum

Module 3: Community Stakeholder Relationships to support Local Forums

Module 4: Resource and Sustain a Local Forum

4 Icons

		
Do by yourself	Do in a group	Case study
		
Do in pairs	Do with your trainer	Key word

SECTION B:

Learning Module 4

*“... not lack of resources, ... lack of resourcefulness
that causes failure”*

– Tony Robbins –

1 Understanding resources and sustainability

An ECD Forum is set up to help its members grow, survive and thrive. To take care of members needs will have a cost in terms of time, money and people. This cost will be covered by resources. Let us discuss some terminology.



Resources

Business Dictionary:

An economic or productive factor required to accomplish an activity, or as means to undertake an enterprise and achieve desired outcome. Three most basic resources are land, labour (work) and capital (material wealth owned); other resources include energy, entrepreneurship, information, expertise, management and time.



Sustainability: Ability to maintain or support an activity or process over a long term.

Business Dictionary:

Economically sustainable: Continued development of growth, without significant deterioration of the environment and depletion of natural resources on which human well – being depends. This definition measures flow of goods and services that an economy can generate indefinitely without reducing its natural productive capacity (amount that can be contained, produced, held).

Benefits of being sustainable

- Energy reduction
- More efficiency
- Reduction on operating costs
- Creating and maintaining good stakeholder relationships
- Attracting better investing partnerships
- Earning local credibility
- Building relationships with government entities
- Well positioned for an advanced future

How can sustainability be achieved:

- Collaborating to save costs by sharing
- Purchasing local – less movement – less cost to environment
- Recycling
- Train people to be able to do for themselves



Community resource/asset

Anything that can be used to improve the quality of community life, this means:

- You or any person – empowered to use their abilities to build and transform the community.
- A physical structure or place – a school, hospital, church, library, recreation centre, social club. It could be a landmark or symbol. An unused building that could be used, a room for community meetings, a public space that already belongs to the community – a park, or field.
- A community service, that makes life better for some or for all community members – public transportation, early childhood education centre, community recycling facilities, health services, arts & culture programme.
- A business that provides jobs and supports the local economy.

1.1 Identify and give information on resources to profile community assets and potential assets

To use resources, you will first have to find them. We are going to learn how to research the area so well that you understand its resource profile. You might live in an area for all your life and be unaware of its resources. Why is this? When you live in a place you start taking it for granted and you do not view what is a resource as a resource.

1.1.1 Identifying resources

The community's perception of what constitutes an asset, or a resource is important. The techniques for identifying community assets are easy.

Answer these questions:

- What is the size of the community you are concerned with?
- What people are available to do search for resources?
- How much time do you have?
- What financial resources, if any, can you count on to support the work?
- What do you want to do with the results?

Community members from a broad range of groups and populations are far more likely to identify assets that may not be apparent to everyone.

Identify community assets daily, especially when you:

- Conduct a community assessment and need to find assets to mobilise to address community needs.
- Include talented and experienced citizens whose skills are valuable but underutilised.
- Cannot provide traditional services, even if you wanted to, and are looking for other ways to build up the community.

- Encourage residents to take pride in and responsibility for local concerns and improvements.
- Strengthen existing relationships and build new ones that will promote successful community development in the future.
- Want to be aware of or when you create awareness about resources and services.

1.1.2 Identifying and classifying resources

Identifying and classifying resources can be done on a template that looks like this:

	Community needs	Resources (number, type)	Description of service or activity (nature, type, style, what is needed instead)
1.	Health	<ul style="list-style-type: none"> • Clinic/Hospital Facility • Midwives • Doctors rooms • Specialists 	
2.	Education	<ul style="list-style-type: none"> • Day Care Creche • Primary Schools • High Schools • Skills/Craft Centre 	
3.	Social	<ul style="list-style-type: none"> • Community Centre • Sports space • Dance/Music 	
4.	Spiritual – Faith	<ul style="list-style-type: none"> • Churches • Mosques • Temples • Meditation centres 	
5.	Expertise		
6.	Land	<ul style="list-style-type: none"> • Occupied • Vacant • Allocated to purpose 	
7.	People	<ul style="list-style-type: none"> • Children • Youth • Differently Abled • Aged • Adults • Employed • Unemployed • Self – Employed 	

	Community needs	Resources (number, type)	Description of service or activity (nature, type, style, what is needed instead)
8.	Entrepreneurs and inventors		
9.	Information	<ul style="list-style-type: none"> • Library 	
10.	Time		
11.	Energy		
12.	Transport	<ul style="list-style-type: none"> • Taxi ranks • Stations • Private vehicles • Trucks/Vans/Busses 	
13.	Gardens		
14.	Money/ investments		
15.	Mineral/water deposits		
16.	Plant and/or animal life		
17.	Other		

1.2 Resource potential – increasing community assets

Maybe a resource is unused this means it has the potential to be used. People that are not using their abilities are potential resources.

Dirty, overgrown empty spaces in an area be an eyesore and be a source of shame. But those spaces can also be open space that can be turned into playgrounds, pocket parks, and farmers' markets with volunteer labour that provides a community-building opportunity.

Community perception is crucial, because seeing something as an asset can make it possible to use it as one.

1.3 Learning Activities



1.3.1 What do these terms mean to you: Give examples

(a) Resources:



(b) Sustainable:

(c) Potential:



1.3.2 Decide how far and wide the community of the ECD Forum is in your understanding. Describe this in terms of need. Identify various projects and give level of community involvement.



1.3.3 Use the template 1.1.2 to help you identify and classify resources in your community on your own list.

2 You are a valuable resource

In Module 2 we worked on your personal strengths and weaknesses in 4.4.2 but it was to help you operate in a team. We looked at your development needs and gave you a template for a personal development plan. This information also applies here.

2.1 Value own potential, establish your worth and the worth of your contribution



Virtue: *Collins Dictionary* – Inherent power or quality of moral excellence e.g. tolerance, just, temperance, faith, hope, charity, doing something unpleasant gracefully, manliness, courage, any admirable trait like sharing, giving, helping others.



Strengths are inherent potentials that influence our thoughts, emotions, and actions. They define who we are and determine our uniqueness. Wisdom, courage, perseverance, and humility are a few instances of the qualities we possess. In psychology, character strengths are defined as innate capabilities that allow us to overcome our thought blocks and encounter adversities with more positivity.

Most people are not aware of their potential. You have so much value to offer e.g. you take care of babies, toddlers and children and deal with the problems that comes with it every day. Because of what you offer, parents have time to do other things. If you stopped doing this work, parents would have a challenge.

To realise your potential you must identify and understand it first as

- This leads to professional success and personal accomplishments.
- The use of potential makes daily life happier and more content.
- Knowing core strengths is a crucial part of knowing ourselves.
- Awareness of what you are good at is more insightful.
- It makes you more likely to make the right decisions.

Fill in this disk with words that express what is valuable, worthy and special about you. Include your mind, body, soul, spirit, behaviour, actions, heart, words. Have fun!



Building Your Tower of Strengths

Task Objective:

You aim to visually represent and prioritise your strengths or 'superpowers', helping you see your unique capabilities.

Gather Your Materials:

- You'll need paper and a pencil or marker.
- Feel free to use coloured pencils, markers, stickers, or any decorative materials you like.

Visualise the Towers	Imagine three different towers. They can be tall, slender, wide, sturdy, or ornately designed. Each tower will represent one of your strengths, with the strongest trait placed on the highest tower.
Identify Your SuperPowers	Reflect on your strengths. These are qualities that make you unique and help you in daily life. Think beyond traditional strengths. Consider kindness, creativity, resilience, or your ability to listen and understand others.

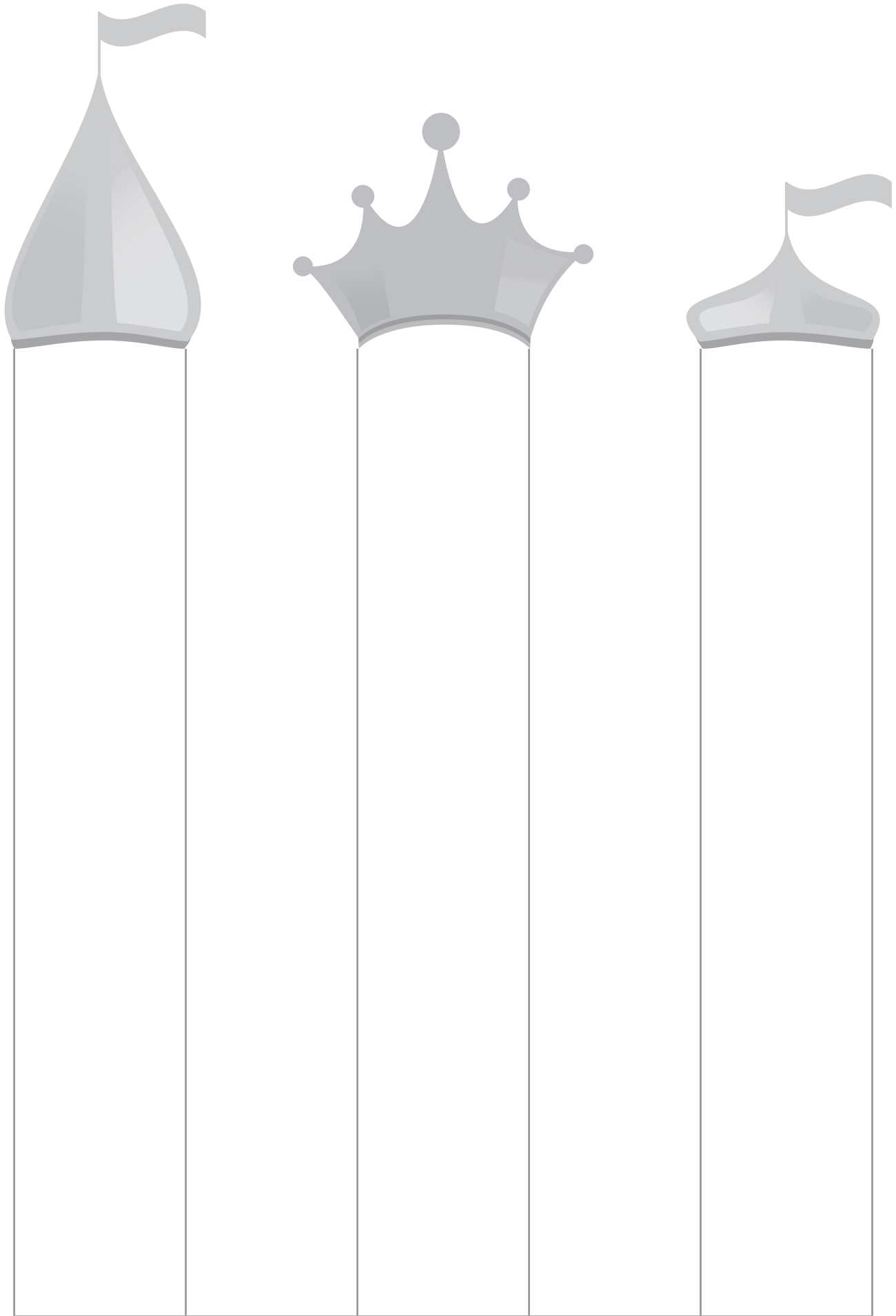
Assign your strengths to the Towers:

First Tower	Place your third strongest 'superpower' here as a solid foundation
Second Tower	Your second strongest trait goes here. It shows you're building upon your foundation
Third Tower	Your strongest 'superpower' belongs here, reaching your highest potential

Decorate and Share Your Towers:

- Be creative in decorating each tower to reflect the 'superpower' it represents. Use symbols, colours, or any elements that resonate with you. For example, a tower for 'empathy' might be adorned with hearts.
- If you're comfortable, share your towers and the strengths they represent. It is a great way to reflect on your strengths and learn about the strengths of others.

Completing this activity creates a powerful visual representation of your strengths. It helps you see your unique 'superpowers', understand your self-worth, and recognise how you can positively impact the world.



2.2. Personal strength-based profile

Three principle qualities define you:

- Knowledge-based skills – Strengths we acquire from education and learning e.g. language, computer skills, ECD training
- Transferable skills – Powers that come naturally to us. Unique strengths that define us for who we are e.g. communication, problem-solving, decision-making, punctuality, etc.
- Personal abilities – Internal (inborn, genetically acquired, or learned from the surroundings in which we grow) capacities/traits that determine our uniqueness. Honesty, trustworthiness, dependability, flexibility, friendliness, etc. can be.

There are many questionnaires, surveys, and evaluations that analyse our strengths and weaknesses, we will work with these four:

1. Self-appreciation

Appreciating and acknowledge your efforts and achievements to make you aware of what you do and the results your actions might bring. Helps identify virtues that you excel in. What are you interested in? What do you like to do?

2. Speak and write plan

Early aim/goal-setting and strategic management is a way of listing strengths for the purpose of using these. Write your vision so you focus on your strengths – this will minimise being misled, wasting time and missing out on opportunities.

3. Mirroring values

Identifying strengths and shortcomings becomes more comfortable when we have clarity about our core values.

4. Asking for feedback

Request genuine criticism from individuals we stay with or work with. Another person's viewpoint can widen our self-perception and change the way we see ourselves, identifying strengths and weaknesses for self-improvement.

Once you know who you are and what you have in your skills set you can determine what you need to close gaps you find in your set of skills. Once you know you can find ways to improve e.g. Find a mentor, a learning programme, learn on-line, etc.

2.3. Learning Activities



2.3.1 Using this template, complete this profile on yourself first and let a friend complete one on you. Exchange profiles and read what you think of yourself compared to what another person that knows you, thinks of you.

	Defining three principles	Notes on abilities, opportunities and overcoming limitations
1.	Knowledge-based skills	
2.	Transferable skills	
3.	Personal abilities – Internal	
	Ways to realise strengths	Notes on abilities, opportunities and overcoming limitations
1.	Self-appreciation	
2.	Writing down plans	
3.	Mirroring values	
Feedback:		

(a) Which strength will you use more of and where will you use it?

(b) What will you try to change? Why?

(c) Think about selecting a project for individual contribution to a specific community: (for 3.3)

3 Gathering resources

Community work requires resources which must be found and gathered. We cannot assume something is there to use, it may be inaccessible. We must find out the rules, codes and requirements and ask for facts about resources at relevant sources like municipalities, other NPOs, government organisations, etc.

3.1 Conducting resource audit

The first step of this audit is on 1.1.2. We are going to take the process further so we can compare the actual resources to real needs to determine the shortcomings. Discuss:

	Community needs	Actual Resources	Description of service or activity (nature, type, style, source)	What is the shortcoming?	How can the ECD forum make better use of this? Give an instruction
1.	Health				
2.	Education				
3.	Social				
4.	Spiritual/Faith				
5.	Expertise				
6.	Land				
7.	People				
8.	Entrepreneurs and inventors				
9.	Information				
10.	Time				
11.	Energy				
12.	Transport				
13.	Gardens				
14.	Money/ investments				
15.	Mineral/water deposits				
16.	Plant and/or animal life				

3.2 Determining mechanisms to gather resources

3.2.1 Listing criteria for selection of available resources from community assets

There might be more of one type of resource, which one will you choose? To prevent sentimental, emotional choices. e.g. We are having an ECD Forum open day to attract new members. In the community we source from, we counted 20 catering suppliers. How will we decide which supplier to use? To make objective, reasonable choices we need to use criteria to get the quality service and give different suppliers a turn to supply.

Criteria		Rating			
		4	3	2	1
		Excellent	Good	Needs to improve	Not yet able
1.	Adheres to health and safety standards				
2.	Buys fresh, quality supplies locally				
3.	Employs local people, especially through using businesses of colour and woman-owned				
4.	Has trained cooks, chef that adhere to hygienic standards				
5.	Delivers catering on time				
6.	Provides catering equipment and supplies e.g. warmers, cutlery and crockery, tablecloths, etc.				
7.	Can take orders for special dietary requirements – diabetic, vegetarian, Halaal, Kosher, Vegan, wheat – free, allergic to nuts, etc.				
8.	Provides a variety of menus to choose from				
9.	Comes in at/under budget costing <ul style="list-style-type: none"> • R20 tea and scones • R45 lunch with meat/chicken/fish, pap and 2 veg 				
	Subtotal				
	Total				

Once you compare resources using criteria you can defend what you decide upon and be prepared to be held accountable. In this way personal relationships cannot interfere with business.

Criteria must be visible and transparent – share this with all the resources (suppliers) so that they can prepare to meet your criteria.

3.3 Resourcing your own community project

In Module 2 (2B5) we did a lot of work on the topic of project management we will not repeat it here, but you can use the tools and techniques you learnt in (5.2.1). In this part of the skills programme we want you to pick the project you mentioned in 4B2.3.

3.3.1 Develop an action plan for personal project in your community

Write the goal you want to achieve. Ask Why?

e.g. *Susan wants to earn more money as the ECD centre she works at pays too little. In response to the problem of schools being closed on weekends and parents still needing to go to work, funerals, etc. Susan wants to start a games, sports, art and culture session on Saturday mornings. She knows she is great with children of all ages and parents trust her. She is aware that she has a fun, sporty and highly creative side.*

Write a simple action plan that addresses the problem Susan's project aims to solve – anyone must be able to follow it like a recipe. It converts the goal or plan into a people process. It has three (1,2,3) essential parts, one part to measure success (4) and one part (5) that leads to ongoing programme or new programme:

1. Based on the goal, the action plan answers five questions -

- What? *games, sports, art and culture session R40 per child, bring own snack and drink*
- When? *Saturdays 8h00-14h00*
- Where? *Empty field next to community hall*
- Who? *Susan and youth looking for part time work, children from 5 to 12 years old*
- How? *Susan will ask the municipality to use the field and the community centre to use the toilets and the kitchen. Susan will ask 3 youth to join her for a meeting to come up with a programme and advertising campaign.*

2. Resources

- 1.1 Toys, different kinds of balls, Nets, Hoops, Cards, Chess sets, Dominos, Board games, skipping ropes, goal posts, rackets, markers, paint, music, recycled printed pages, cardboard, whistles, music instruments especially percussion instruments, recorders and drums, stationery, etc
- 1.2 Fruit and Juice, water
- 1.3 Prizes for competitions
- 1.4 Field
- 1.5 Community Hall toilets and kitchen
- 1.6 Three to four young people who fit the profile
- 1.7 Sandra
- 1.8 Appoint someone to trouble-shoot on the day of the event where resources are needed and if anything unpredictable happens

3. Potential Barriers

Post alternative plans for each of these contingencies so that in case they happen you have a response which can quickly be put in place.

- 3.1 Rainy/cold days with no shelter – arrange to use the community hall during winter and spring season if the weather is bad.
- 3.2 If Susan has a funeral, family emergency – Susan will train her friend Mary to stand in for her when she is unavailable. Susan will ensure the youth are well trained and every week has a programme so that the programme can run without her.

4. Monitor and Evaluate – Ask more questions based on the goal

Are you making the extra money you needed Sandra? How much more or less than your target?

Are parents using the service? Are the youth working out?

Are the children enjoying the programme/service?

5. Restart with a new problem, or refine the old problem

Take what you learn from the M & E and decide what happens to the project.

3.3.2 Propose and present personal project idea/concept to stakeholders to obtain buy-in

3.3.2.1 Proposal development



Proposal: an offer tailored to a client/stakeholder. (*Collins*)

A proposal is not a business plan. It is a request for an opportunity which you see. Maybe the client/stakeholder does not see the opportunity, so you are making them aware of this opportunity. Sometimes they are aware that there is an opportunity and you are responding to their invitation to submit a proposal. Often called Request for Proposal (RFP). Often, the stakeholder thinks there is an opportunity, but they do not know enough about it so they can invite you to submit information. This is known as Request for Information (RFI). The stakeholder will then use the information to develop a RFP. This proposal must clarify how your services can solve the stakeholder's problem.

A proposal writer knows and understands the stakeholder's problem and understands the specific solution to that unique problem. Do not submit a general proposal – you need to be specific to the stakeholder's problem or challenge.

A proposal involves:

- Preparation: describe why you are the best supplier to solve the problem. Understand exactly who will read this proposal (audience).

Audience:

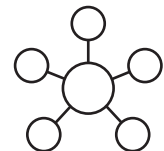
- o What is their role?
- o Who is the decision maker?
- o What are their main concerns? Are these concerns also the forum's concerns?
- o What supports or resources do they already have? How can the forum's resources add to theirs to amplify the impact?
- o Are they familiar with your solution and forum?
- o What is their industry background and how can your ECD Forum know how to contribute?

Writing a proposal so that the reader (audience) understands will save time and effort in helping the stakeholder decide on which supplier to use.

- Meeting criteria: If the stakeholder has set out criteria, make sure you meet the criteria or show how you plan to meet these criteria. Focus on what they need.
- Showing how this ECD forum can make your stakeholder's organisation great. It is not about how great your ECD forum is.
- Making it clear why the stakeholder should choose this ECD forum?
 - o Where/How can this forum add value and special touches
 - o How can your offering bring long term positive impact and success for the stakeholder?
 - o Which special aspects about this ECD forum makes you "the go to" supplier?
 - o Show proof of what you have done before that shows your talent
- Show you know and can beat your competitors. Not by speaking and making empty promises, but by the results you have achieved and are capable of.

Draw a mind map:

Capture all the ideas/concepts and organise these into a coherent, convincing case to show the links into one cohesive diagram. If one idea/concept leads to another the diagram must show how it cycles or flows or grows.



Actual proposal parts:

- **Title:** snappy one line summarising the problem and solution
- **Executive summary:** a brief overview of the important information for someone who wants a quick source of what is in the proposal.
- **Overview/Opportunity Statement:** The problem and the solution in the way your ECD forum understands it. Some stakeholders might have explained the problem so you can



mention their words, but if you analyse it further it can help show you really do know and understand the cause and effects of the problem. Show them how everything you can do in your solution will bring them to what they want. Define the scope of where it begins and ends.

- **Deliverables on time:** what will happen when. Promise only what you can do. Be reasonable.
- **Budget:** Some readers read the budget first. Be factual with correct calculations for each item with a cost. The proposal must support what is in the budget – you cannot charge for something you not offering.
- **ECD Forum Background and History:** The stakeholder wants to know
 - (i) *what the solution is* and
 - (ii) *the cost* then
 - (iii) *who can offer the solution* and why can you offer this.Provide contact and relevant skills information on the team who will implement the work. If you have previous similar work and case studies of sample work as evidence, it will help make a strong case for why they must choose your ECD forum.

In a proposal, use graphic images, pictures, icons and graphs to illustrate information. Not everybody in the audience enjoys reading words only. If you want to capture an audience use clear easy to understand words with a balance of images.

Style of writing:

- Be business writing style and formal
- Be clear, positive and brief (concise)
- Use active not passive voice as active voice is stronger and easier to read.
 - Passive voice: *The food will be delivered by the caterer.*
 - Active voice: *The caterer will deliver the food.* ✓
- Be purposeful – persuade, advise/educate



3.3.2.2 Presentation techniques

You have already practiced presentations in some of the group work activities. The trainer/facilitator has also made some presentations. Now we will discuss how you can make a presentation that will convince stakeholders to buy into your ideas. These are sales and marketing techniques.

A presentation requires you to get a message across to the listeners and will often contain a 'persuasive' element.

We will watch a few videos to help us with this section.

<https://www.youtube.com/watch?v=dEDcc0aCjaA>

Guy Kawasaki of Apple suggests that slideshows should:

- Contain no more than 10 slides;
- Last no more than 20 minutes; and
- Use a font size of no less than 30 point.

<https://www.skillsyouneed.com/present/presentation-tips.html>

Barriers to effective presentations

- **The use of jargon** – over-complicated, unfamiliar and/or technical terms.
- **Emotional barriers and taboos** – it is difficult to express emotions and some topics may be 'off-limits' e.g. politics, religion, disabilities (mental and physical), sexuality and sex, racism and any opinion that may be unpopular.
- **Lack of attention, interest, distractions, or irrelevance** to the receiver.
- **Differences** in perception and viewpoint.
- **Physical disabilities** such as hearing problems or speech difficulties.
- **Physical barriers to non-verbal communication** – Not noticing non-verbal cues, gestures, posture and general body language can make communication less effective.
- **Language** differences and the difficulty in understanding unfamiliar accents.
- **Expectations and prejudices** which may lead to false assumptions or stereotyping.
- **Cultural differences** – the norms of social interaction vary greatly in different cultures

3.3.3 Materials for responding to community needs are selected appropriately for specific communities

Consider the budget, the situation, the context and circumstances when deciding and selecting resources. Culture and values also play a part.

To prevent wastage and loss make sure you have enough, but not too much. Oversupply is wasteful expenditure, even if it may be a donation granted, the resource could have been used by others. Ask for enough and take only what you need.

Always find out what visitors need if you are inviting strangers, new contacts and people that you are unfamiliar with. e.g. you invite a motivational speaker to your Annual General Meeting. You assume they can stand for 30 minutes while speaking. You are unaware that the speaker has had a medical procedure and must sit. On the day, you will end up rearranging the seating on the stage.

Imagine having a forum meeting at a creche and the only chairs are the children's chairs and tables. The members will be uncomfortable.

Food is also something that needs to be ordered with some careful thought. Special requirements make it complicated and sometimes no food is better than food that cannot be fed to everyone.

3.3.4 Instructions for gathering resources

Giving instructions sounds easy but things can go wrong when someone understands something in a different way.

If you are sending people to do things with someone else, that person should be aware of who you are sending and what this means. Make sure you introduce people and clear any obstacles that may prevent the person you are sending from making the collection.

When giving instructions:

- Be sure that you understand which resources, from who, how to collect, how to transport, how to store during transportation, for what purpose and where must this go to once collected.
- Be aware of risks and listen to those you are instructing in case they know of more risks – secure and assure the resources and mitigate risks
- Be clear, concise and specific
- Allow for questions while you are giving instructions. Take concerns and queries and resolve these. If you do not know, be honest and find out.
- Ask for examples and explanations to clarify what you have said. Do NOT ask do you understand – people will mostly say yes. Use examples too
- Give time frames – if flexible, how flexible?
- Give alternatives and allow people to say what they think and give suggestions
- Set boundaries – on resources, costs and expenses, how claims will be paid
- Give roles and allocate responsibilities
- Offer support
- Set up contact to ask questions along the way



“Leadership crises erupt when people who have not learnt how to obey instructions are given the privilege to give commands.

Leaders are experienced servants.”

– Israelmore Ayivor –

3.4 Learning Activities



3.4.1 SIMULATION: Pretend your forum is arranging a fun day at the local sports field for children, parents and community. You are on the events subcommittee of the forum. Set up a criteria list for selecting a transport and a tent supplier for this event.

- The transport supplier must transport children, ECD caregivers, members of the forum, parents and community members to the field. Some can walk, but some need transport. Make up the detail. Two other forums in neighbouring communities also want to join in and asked for this forum to arrange transport which they will pay for. Add this detail too.
- A tent supplier must be sourced to fit the number of people that will attend during the mealtime and the opening programme.



3.4.2 Set up an action plan for the fun day. (Show resources, time frames, allocation of responsibility, task descriptions, deliverables, monitoring and review process, etc.)



3.4.3 PRACTICAL PART 1:

Develop a proposal (highlight your/personal involvement) in response to this advertisement:

JGB Trading International

RFP

Distribution of ECD resources to ECD centres in the Gauteng Province by an organised body who can train ECD practitioners on how to use the resources.

Criteria:

- Only Registered ECD Forums with more than 35 members may apply.
- Trainers that show practitioners how resources work must have Level 4 ECD qualification. The Forum must have at least 8 Level 4 trainers to qualify.
- The Forum must have the ability to contact people via email, keep records of distribution of resources and book venues close to the ECD centres it distributes to.
- Monitoring reports on implementation is expected monthly
- A final report will be expected on numbers reached with proof of receipt from ECD centres.

Email proposal to: Dan Maake info@jgb248trading.co.za

Compulsory briefing will be held at Sunshine Community Centre, Diepsloot at 10H00 on 25 June 2020 to answer questions. Book your place by confirming attendance RSVP@jgb248trading.co.za

Notes:



3.4.3 PRACTICAL PART 2:

Present a 10-minute pitch of the proposal in Part 1, to the adjudicating panel. Follow the following criteria:

Criteria		4	3	2	1
		Excellent	Good	Needs improvement	Not yet started
1.	Impactful opening				
2.	Clear, meaningful visual aids				
3.	Speaker audible				
4.	Engaging audience				
5.	Team/group support				
6.	Handling questions and feedback				
7.	Strong, memorable close				
8.	Memorable closure				
9.	Enthusiasm				
10.	Passion				
Total					



3.4.3 PRACTICAL PART 2:

Present a 10-minute pitch of the proposal in Part 1, to the adjudicating panel. Follow the following criteria:

4 Distribution of resources according to criteria



Resource allocation or resource management: is the scheduling of activities and the resources required by those activities while taking into consideration both the resource availability and the project time.

Resources are crucial to an organisation's strategy and vision and managing them well goes a long way in achieving that vision.

The most successful leaders know that to keep a team on track they must find the most operative way to continuously measure their performance and more importantly, their effectiveness. There are countless ways in which you can choose to measure team performance. It would be pointless to set objectives and give them time frames when the performance is not going to be checked. It is important to let the team know that they will be evaluated on the objectives so that they can be more effective in trying to achieve them.

4.1 Read the case study on the listing of criteria and distribution of resources to beneficiaries

CASE STUDY 8

Mmalefu is an ECD forum president who selected a couple of forum members in respect of their skills and strengths to sit as a committee to gather resources. The main purpose is to support the ECD centres that need such resources. On the committee sit, Lesego-fundraiser; Gorvin- The treasurer; Martha- Events coordinator; Daniel- Proposal and report writer. All the identified members are trusted to bring in the required resources. They follow the following steps:

- Identify the needs and resources needed.
- Compile a list of all available ECD centres.
- Develop a resource distribution criterion and ID centres that qualify
- Write a proposal to the local stakeholders (who are capable of sponsoring with the needed resources).
- Come up with a communication plan for sharing the messages to all stakeholders in terms of how the resources will be distributed.
- Compile a resource record report

All steps have been taken into consideration and one of the local stakeholders (Thusanang Supermarket) has offered to donate drawing books, plastic chairs, play dough, pencils, crayons and nappies.



The committee intervenes and investigates. They find the distribution criteria states that start-up ECD centres that have no support and lack such resources will be the first to receive.

Now Lesego is fuming as she took her time to be a part of the committee, ran around using her petrol and time meeting with stakeholders and offered her bakkie to go collect the resources. She feels wronged and she thinks it is unfair on her. Mmalefu calms her down and calls a meeting to communicate with all members about the importance of sticking to the agreed upon criteria and to realise the importance of putting others first.



They agree to refund Lesego for her travel costs and she feels better. She decides on an amount for the transport costs and the committee pays the amount to keep the peace.

Source: Amelia Ratlhankana (fiction made up for learning on this case study)

Relevant information obtained and supplied:

This shows that it is important for forum members to agree on and set up distribution criteria before resources arrive and ensure that effective communication is done concerning the criteria. All stakeholders need to be reached with clear communication so that everyone understands how resources will be distributed and why. Conflicts often develop if communication is not clear, reaches right person on time and in the right way.

ECD forum members and project stakeholders must send out messages about resources in a manner that:

- Will reach as many people as possible.
- Are sent out on time (before the resources are delivered).
- Ensure that the people's views are gathered and are built into the project.
- Targets and agreed upon criteria can be communicated clearly.

Take advantage of using the different skills that the members have, to communicate the messages within the forums and with the stakeholders. You might even find a volunteer to set up and maintain a social networking presence for your forum.

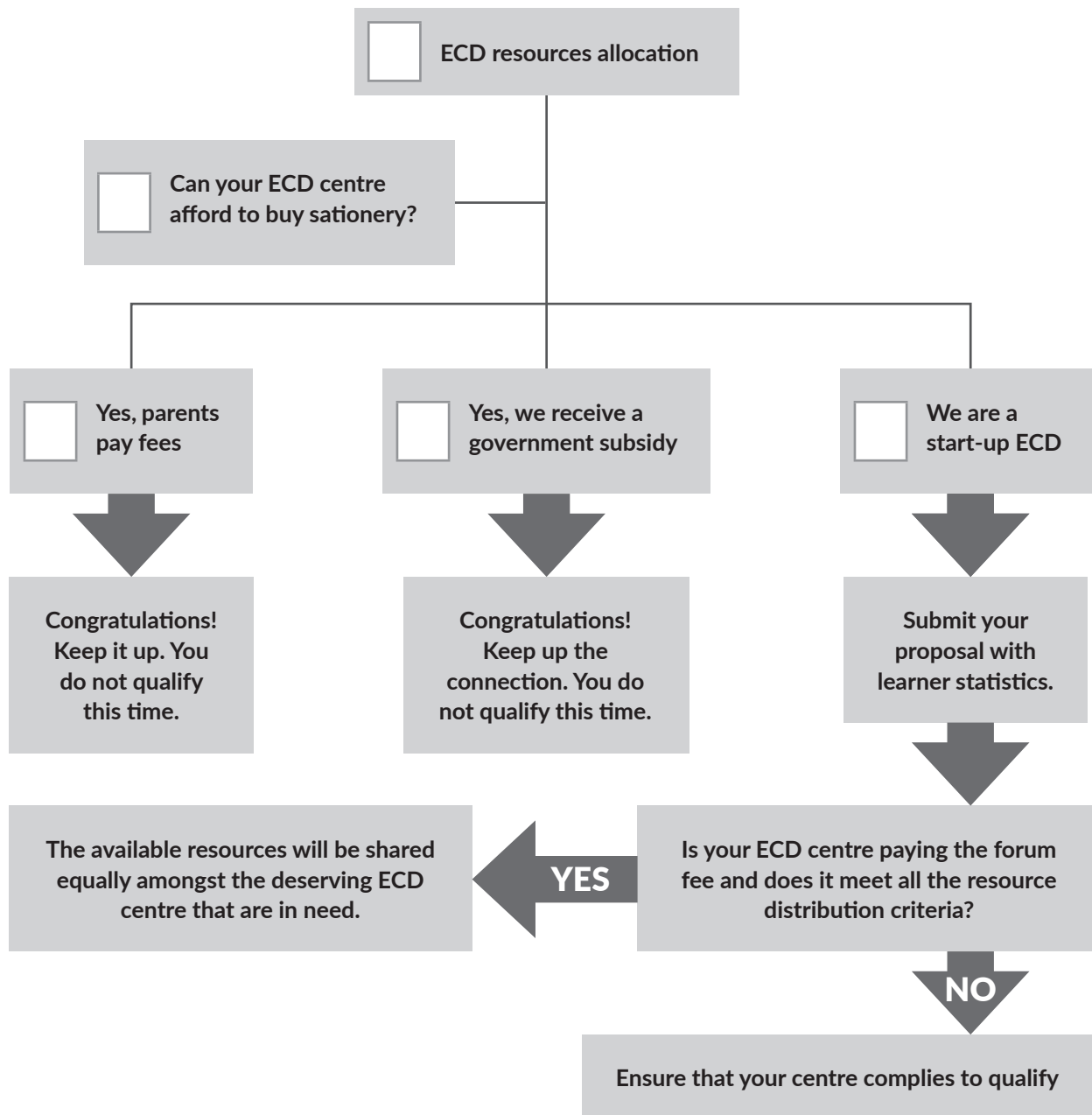
The following are ways to share the messages on relevant information

- Word of mouth
- Events (awareness campaigns)
- Email & websites, social networking (WhatsApp, twitter, Facebook, etc)
- Newsletters, leaflets, posters, flyers, loud-speaker call outs
- Consultations
- Work plans & updates

Advantages of sharing messaging in a good manner and on time

- Gives everyone an opportunity to listen and understand
- Gives the forum management a chance to listen to stakeholder views
- Avoids conflicts
- Increases stakeholder engagements
- Ensures smooth flow in resource allocation
- Makes everyone understands their roles better
- Contributes towards sustainable thinking
- Results in good project delivery

4.2 Organisational meetings



This example can be used for any resources available and should be revisited before the start of every project to collect resources or before any sponsorship can be distributed to the needy centres. There also must be a register for each resource that is distributed which indicates who received and who still needs to be accommodated. The very first step should be for the ECD forum to develop a spreadsheet with all its beneficiary ECD centres and all their needs. This will also inform the fundraising team and the resource team to have an idea of who needs which resources before requesting for support from external stakeholders. The spreadsheet should be updated regularly as centres are dynamic and change. The spreadsheet should be openly communicated to all stakeholders to ensure clear communication of messages and to avoid conflict.

4.3 Distribution plan – time frame for distribution activities



Distribution Resource Planning (DRP): a process that allows you to define inventory levels, calculate inventory requirements over time based on who must receive.

This process integrates several variables such as:

- Product quantity required at start of cycle
- Maximum product quantity available at start of cycle
- Recommended order quantity at start of cycle
- Pending request at end of cycle
- Inventory available at end of cycle



Understand the Project Scope – The first step towards setting up a resource plan for your project is to understand the goals and requirements of the project. Clearer the scope, easier it is to estimate the number of hours, assess the skills required & timeline needed to meet the project goals.

Resource Availability – Identifying your available resources is essential to furthering your resource allocation plan.

Time Tracking & Resource Utilisation – Keeping track of the project estimated hours it is taking to deliver these. Once your resources are on-board, start assigning tasks with proper due dates and estimated hours.

Provide them with an easy to use central project management tool for time tracking.

You can simply use a dairy or annual plan. Let us plan using this calendar and making notes on the calendar for the month of January 2024. You must have an AGM on the and are planning the resources for this event.

JANUARY

january

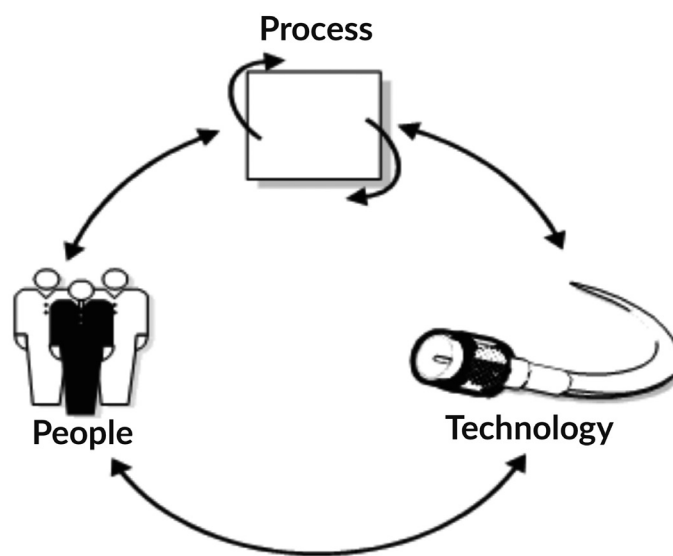
2024

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Let us set up the plan to use resources. With coloured pens, mark:

- The main event on the calendar and when you will set this up
- When will the venue be booked?
- When will the catering be ordered, by who and when delivered?
- Decide who will do what and add their names to the date when the action happens
- Give a time for creating the invite to members and community and a date for the follow up
- Set the agenda and prepare presentations, attendance registers
- When will you share the documents with members?

Total business resource solution involves three key elements:



1 People – For the most important element in your solution, you must provide education and management commitment. People are the keys to success. Involving and empowering people to get the job done are important steps in ensuring the success of your enterprise.

2 Process – Policies and procedures to manage effectively is needed here. People need to be trained to follow the process. Have formal documentation of the process that is approved by management. Costs, schedule, and quality are the direct outputs of the business process. Quality processes result in a quality product. The product meets customer specifications of design, schedule, and price.

3 Technology – You can use devices and internet to send messages and communicate. This can also be used to stay in touch, so that you know what resource is being distributed, by who to who at which time and what location and if the resource has been received. Further to this, you can keep in touch with the recipient to know if they are using the resource, how they are using it and if not, why.

You always want to keep a close eye on time, how your team is working and if they're being

efficient. It is your job to make sure that a task that can be completed in a day does not take a week. There are ways to improve time tracking.

To do this you must keep track of your team's workload. That requires the right tools to give you real-time data collected on one page where you can both see and schedule ahead when needed.

Following the right processes and using a complete resource management tool can make resource distribution easier and benefit from it in many ways:

- It improves visibility of all resources across the forum.
- You can easily avoid the misusing of resources.
- It helps to keep records more accurate

4.4 Controlling sharing/giving/distribution

To know if someone received something you need proof that they received it and you need feedback. The recipient must remain in contact with the ECD forum during and after the process.

To know if someone worked somewhere you must have proof. e.g. if one of the forum members are supposed to mentor ECD centres, you must insist that the ECD signs a register to show that the mentor visited and for how long they stayed. Someone else in the forum must then verify if this happened.

Controls are parts of the process where tools are used to count and record activity, attendance, etc. A person receiving something must declare that they have taken receipt, what they received, when. Here is an example:

COMPANY Name [Address of company] [Contact of company]	
DATE:	[..... 00, 0000]
Deliver Details _____ _____ _____	
Receiver: [Name: _____] [Address: _____] Signature: _____	

4.5 Learning Activities

Read Case Study 8 again and answer these questions:



4.5.1 Why did the president of the forum stick to using criteria, even though he knew how much Lesego did?



4.5.2 How could the committee have avoided this resource distribution situation?



4.5.3 (a) Do you think the forum has a travel claims policy? Give a reason:

(b) The next time, someone transports anything, what do you think will happen?



4.5.4 Design a receipt form for the items that each ECD centre will receive so the recipient can sign and date the declaration.



4.5.5 Draw up a resource distribution plan for the committee assuming 10 ECD centres qualify for the resources. Show how you will obtain and supply information to them about it. List what should be in each package and give dates to show how this will be distributed within two weeks of receiving it.

A large empty rectangular box provided for the student to draw up a resource distribution plan.

5 Keeping records on resources



A **record** is a document or an electronic storage of data in an organisation which acts as evidence or a guideline. A project record management is a systematic process, which allows people to retain records for future use. It outlines the details which are relevant to the project. Hence, project record management needs to be monitored and retained in a careful manner.

Records and documents are one of the most vital components of any organisation's operations. New project information and a few different records and documents will be created during the lifecycle of projects run by the ECD Forum.

Records are the only mechanism for maintaining traceability of various activities done and decisions made during the lifespan of the ECD forum. It is especially important to manage these records and documents. Such records are of paramount importance for current and future reference – even from legal standpoint.

Management is an approach, which helps managers to manage the work using controls to meet the deadlines and other requirements such as cost and resources.

These controls involve proper and effective recording of project management activities. Record management is a systematic approach for:

- Organising,
- Planning and
- Tracking documents

5.1 Resource record management

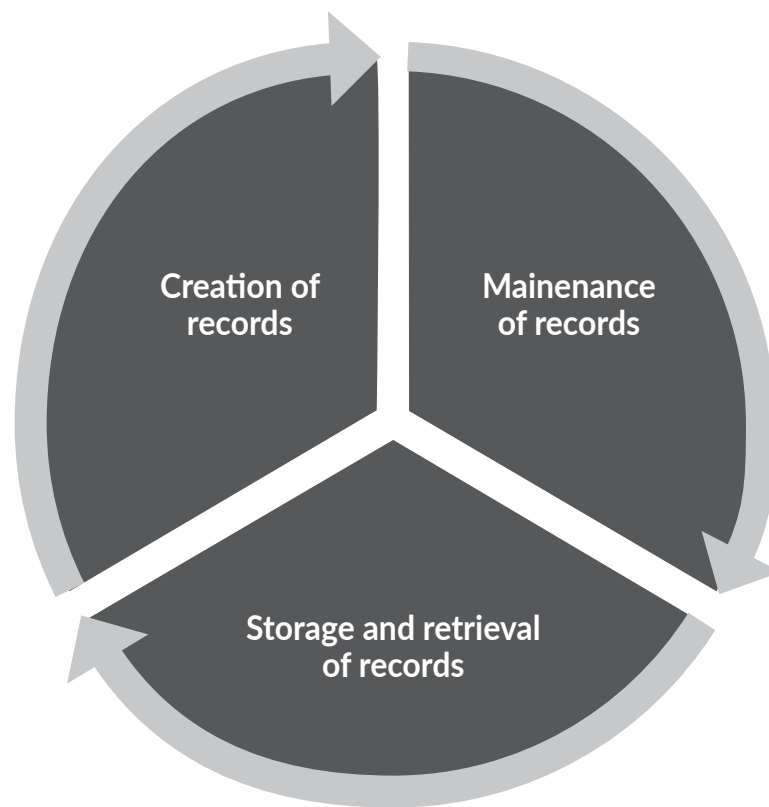
A record system is a systematic process in which an organisation determines the following considerations, activities, and characteristics:

- The type of information that should be recorded.
- A process for recording data.
- Handling and collecting of records.
- The time for retention and storage.
- Disposal or protecting records, which relate to external events.
- Elements in a record management system.
- Content analysis, which states or describes the record system.
- A file plan, which indicates the kind of record that is required for each project.
- A compliance requirement document, which will outline the IT procedures that everyone needs to follow. This will ensure compliance.

- A method, which collects outdated documents. These should be done across all record sources such as e-mails, file servers, etc.
- A method for auditing records.
- A system, which captures the record data.
- A system, which ensures monitoring and reporting in the way which records are being held.

5.2 Three stages of records

In the record management process, there are three distinct stages. These stages have many other activities involved to complete and accomplish the objectives for each stage. The stages are:



Let us have a look at each of the stages in detail.

5.2.1 Creating Records

This refers to the underlying reason as to why the record is being created. This could be for a receipt or for an inventory control report or some other reason.

The primary objective of project record management is to determine the flow of the record handling once the record is created. When it comes to creating records, the following questions should be answered.

- Who will view the record?
- Who will be the final owner of the record?
- Who is responsible for storing the record?

5.2.2. Maintaining Records

Developing an operation to store the records refers to maintaining the records. The access levels to the records should be defined at this stage and should take all necessary steps to avoid the records getting into the wrong hands.

Proper compliance procedures and security measures need to be in place to avoid misusing of records.

5.2.3. Storing and Retrieval

Storing of records could refer to manual storage of documents as well as digital storage. Ensure that the records are returned in the way it was borrowed. Maintaining records also refers to the amount of time that records can be maintained.

Some organisations may *retain records up to six years* whilst others less amount of years. If records are saved digitally, proper folders need to be created. Once created, the older documents need to be archived so that hard drive space is retained.

5.3 Record management planning

Records, which are gathered needs to be planned for. The following outlines the steps that management needs to take to ensure record planning process is successful.

1. Identification of roles, which ensure that records are managed properly. Allocating dedicated roles or appointing dedicated people to categorize the records, which are available in an organization.
2. Appointing people to implement systems, which maintain and support record management.
3. Managers need to make sure that the team members are aware of the procedures in place for record management.
4. The record management process needs to analyse the content of the documents, which are to be saved.
5. Implement a file plan, which will store the different kinds of files
6. Design effective record management solutions.
7. Planning of how content can be moved to record methods.
8. Develop a plan where e-mail integration could be made.
9. Plan a compliance procedure for social content.
10. Develop compliance procedures that align the objectives of project record system.



5.4 Fixed asset register

The ECD forum might own some equipment, furniture, vehicles, and other items. It is important to keep a register of these items.

Why?

Let us watch this video

<https://www.youtube.com/watch?v=QvCZYT3Hp3g>

Notes on video:

Sandy Dunn, Director of Assetivity advises 3 tips:

Tip 1: Understand why you need an Asset Register

Accountants and auditors need an asset register so that the organisation's balance sheet can be accurately calculated. They also need to make appropriate insurance or warranty (guarantee) claims in the event of loss or damage to the equipment.

Tip 2: Establish a logical grouping of assets

Group together assets that belong to a related system – which makes it easier to determine the asset value for the entire system.

Tip 3: Establish structured, easy to understand numbering and naming conventions

Name and number your assets. Names and numbers should be easy to understand so that equipment can easily be identified, and names and numbers easily remembered.

5.5 Learning Activities



5.5.1 Draw and describe the 3 stages of record management each in your own words:



5.5.2 If the ECD forum has four sub-committees and they each have similar documents and records for (i) Meetings, (ii) Team information (iii) Resources collected, how will you label and number their files/folders so that you don't get mixed up between these. You can choose which subcommittees these are.

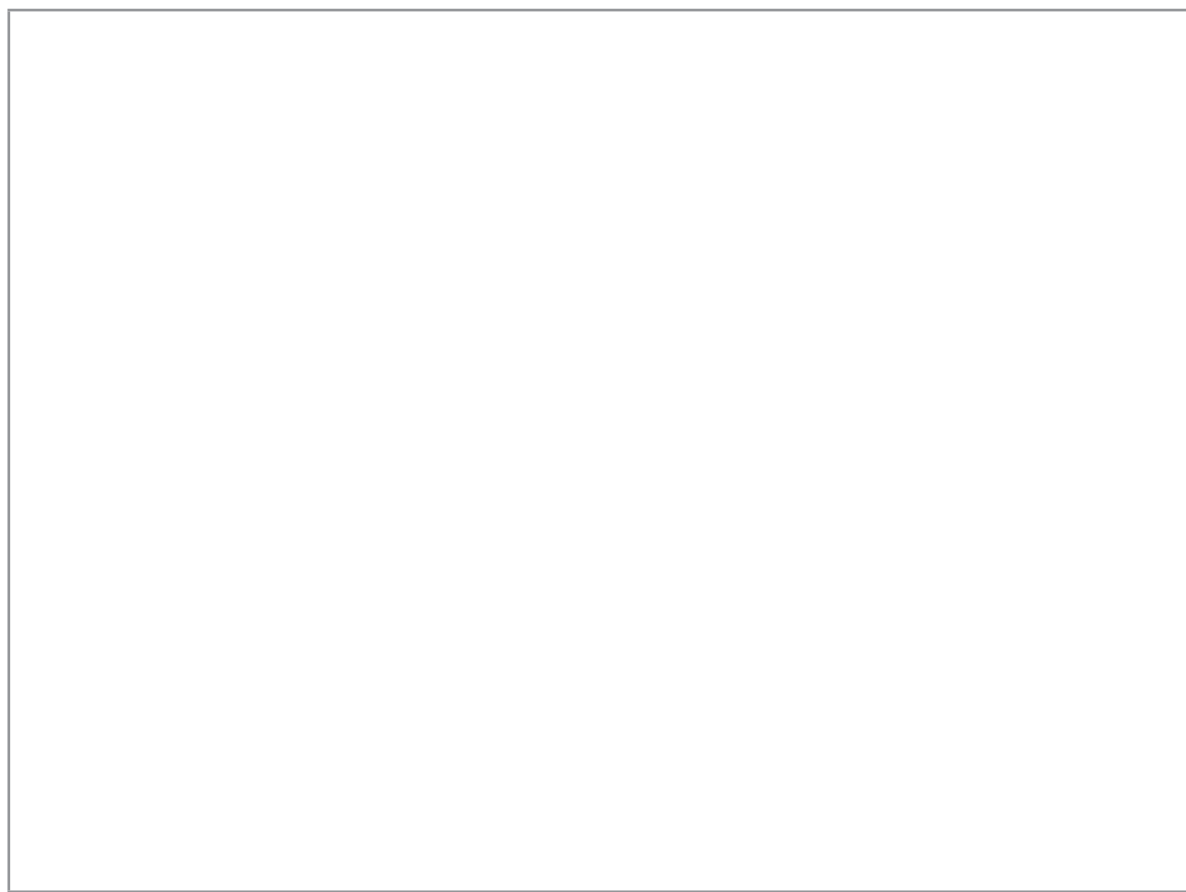
e.g. Event Committee can be *ECMeetings*; Fundraising Committee can be *FCMeetings*



5.5.3 What is an asset register? Draw one with 10 fixed assets for your ECD Forum or church or community club. The assets must be listed in alphabetical order but grouped in a systematic way to show where they are used/belong in the organisation. We must be able to see which are used together.

A large empty rectangular box provided for drawing an asset register.

Reflections on Module 4



SECTION C:

**Sources of Information
in Module 4**

SECTION C – Sources of Information in Module 4

The Early Care Foundation acknowledges these sources of information:

1. Cover image courtesy: <https://www.moving.com>
2. South African Qualifications Authority for the use of Unit standards used in this learning programme.
3. Dictionaries include: Business Dictionary and Collins
4. Positive Psychology website
5. Skills you need website

Source websites on the internet

Section B1: You are a valuable resource

<https://www.rmagreen.com/rma-blog/what-are-the-benefits-of-becoming-sustainable>

<https://ctb.ku.edu/en/table-of-contents/assessment/assessing-community-needs-and-resources/identify-community-assets/main>

<https://positivepsychology.com/strength-finding-tests/>

Section B2: Gathering resources

<https://positivepsychology.com/strength-finding-tests/>

Section B3: Values and Principles that Underpin Community Development

<https://extension.psu.edu/the-seven-steps-of-action-planning>

<https://www.instructionalsolutions.com/blog/proposal-writing>

<https://www.skillsyouneed.com/present/what-is-a-presentation.html>

<https://www.youtube.com/watch?v=dEDcc0aCjaA>

<https://www.skillsyouneed.com/present/presentation-tips.html>

<https://www.skillsyouneed.com/ips/barriers-communication.html>

Section B4: Distribution of resources according to criteria

<https://knowhow.ncvo.org.uk/how-to/how-to-communicate-with-your-local-community>

<https://www.planilog.com/en/glossary/distribution-resource-planning-drp>

<https://www.orangescrum.com/blog/effective-resource-allocation-plan.html>

https://docs.oracle.com/cd/E26228_01/doc.93/e21770/ch_over_manf_dist_pln.htm#WEAMP114

<https://www.projectmanager.com/blog/resource-allocation>

<https://za.pinterest.com/>

Section B5: Keeping records on resources

https://www.tutorialspoint.com/management_concepts/project_records_management.htm

<https://www.knowledgehut.com/tutorials/project-management/project-records-management>

<https://www.youtube.com/watch?v=QvCZYT3Hp3g>

<https://www.assetivity.com.au/article/maintenance-management/5-tips-for-a-better-asset-register.html>

We are thankful for your valuable contribution towards this skills programme for Community Forums in South Africa and the work of The Early Care Foundation in the ECD Context.

ECD Forum Leadership programme

MODULE 1:
Understanding Community Development
(within an ECD context)

MODULE 2:
Establishing a Local Forum

MODULE 3:
Community Stakeholder Relationships to support Local Forums

MODULE 4:
Resource and Sustain a Local Forum

Materials developed by the Early Care Foundation

ECD FORUM LEADERSHIP PROGRAMME

