

Operate a basic administration system for a small CBO



Level 2

Facilitator Guide

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

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CBO

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- Facilitator Guide -

The development practice project

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

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






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SOME NOTES ON FACILITATION SKILLS

What is facilitation?

Facilitation is the process of making learning easy. This is done through the use of various approaches such as small group discussions, debates, question and answer sessions, personal reflection and sharing, experiential activities and practical exercises. You allow participants to discover solutions for themselves and encourage them to internalise lessons learnt, rather than lecture on topics.

Your role as the facilitator is to:

- Give direction to the group
- Create a comfortable and friendly environment for the group
- Observe what goes on in a group
- Identify the main needs of the group
- Learn ways to address these needs
- Adjust to the level of the group – in language, content, presentation, and pace.
- Apply and practice these skills in many different situations



Key principles of facilitation

Confidentiality: What is shared in the group remains in the group. Personal and sensitive information will not be told to others. However as evaluations of the course need to be done, and lessons learnt from each course, obviously you will need to discuss some of the content with your colleagues.

Respect: We should respect each other's opinions and experiences, even if they are different from our own or we do not agree with them –this includes the facilitator, who needs to display respect for every learner's opinion and contribution, and to make sure that s/he provides opportunity for all to participate.

Non-Judgmental: It is fine to disagree with another person's point of view but not to judge or put down another person because they do not feel the same as you do. This is particularly important because as a facilitator you have a lot of power in the group (people look up to you) and so you need to make sure that you do not appear to judge or dislike someone.

Use I-statements: Using I-statements ensures that the view you are expressing comes from you. It also shows confidence and assertiveness. It clarifies that you are speaking for yourself and not for the group.



Integrity: Walk your talk! Be a role model for the group. For example, the ground rules apply to the facilitator the same as for the participants – if it says cell phone silent, do not answer calls in the workshop!

Do's and don'ts of facilitation

Do's	Don'ts
Plan and prepare for sessions in advance	Create a long dialogue with one participant
Show interest when listening	Criticise on a personal basis
Use simple language	Dominate the group
Act responsibly	Be biased
Be patient	Be insensitive
Allow participants to discover	Allow domination
Encourage active interaction	Go beyond time allocated
Ask for suggestions from the group in answering questions	Exaggerate enthusiasm about delivering session – be false.



Critical skills of a facilitator

Listening: You pay attention to what is being said, show interest by nodding your head and maintaining eye contact. Allow the speaker to finish without interrupting (unless they are dominating the group and haven't allowed others to speak).

Paraphrasing: You repeat what the person said using your own words (i.e. interpret or reword). This is to ensure you understand and are not making assumptions.

Summarising: You sum up by going over the main points. You help participants to gain a better understanding of the subject.

Creativity: You must always have a plan B. Be imaginative and stimulated. Make your sessions fun yet educational by ensuring that the group does not miss the learning points. You know when and how to use ice-breakers, energisers and humour (without being offensive). Identify different ways of achieving the objectives without compromising the quality of the session.

Awareness: You pay attention to what is not being said in the group, their unspoken needs and watch out for group dynamics that need attention. You are able to “read” the energy and level of the group and adjust your programme accordingly.



Qualities of a facilitator

Good	Bad
Punctual and organised	Disorganised
Presentable	Messy, no care taken in presentation
Confident	Low self-esteem
Assertive	Passive
Friendly	Rude or impolite
Knowledgeable	Uninformed
Approachable	Intimidating
Creative and flexible	Rigid and unaccommodating

The difference between facilitation and presentation

Facilitation	Presentation
Interactive process	One way process
Use of different methods of approach	More formal
Participants discover for themselves	Audience receive the message
Facilitator works with participants as a team	Presenter delivers the message
Use different ways of facilitating (e.g. role plays, debates, small groups etc)	Use one way of presenting – normal “lecture” style



Tips for being a good facilitator

- Remember that you are a role model. Do your best to practise the behaviour you are talking about
- Keep studying and researching, learn about the issues, develop leadership skills
- Share information, be open to new experiences – there is always something to learn
- Ensure that you give accurate and updated information
- Understand your target audience
- Use target/ age appropriate activities
- Always strive to keep to time
- Use ice-breakers and energisers that add value to sessions (and where possible, link to the content presented)
- Keep your mind open and flexible
- Have fun, love and enjoy what you are doing



OVERVIEW

Welcome to this facilitator's guide. This guide was developed to – Operate a basic administration system for a small CBO (Level 2). The manual provides information that will help you to assist learners to develop skills and acquire knowledge to operate a basic administration system for a small CBO.

What you will cover in this course

This course consists of the following:

- 1) What is an administration system?
- 2) Know your organisation and your community
- 3) Basic office functions
- 4) Basic tools for organising work
- 5) Day-to-day recordkeeping
- 6) Filing systems



SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

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



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

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



OPERATE A BASIC ADMINISTRATION SYSTEM FOR A SMALL CBO – LEVEL 2: COURSE PLAN

Workshop – Day 1

Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
09h00	Introductions and welcome	Start your session by allowing participants to get to know each other and the different organisations that they come from.	Name tags Koki's		
	Expectations	Give the learners an opportunity to state their expectations for the course. They can write their expectations on small cards. Stick these on the newsprint so that you can use it for evaluation again at the end of the course. Use this to introduce the different modules that will be dealt with and also to ensure that they know what will not be covered. Explain the outcomes of this Level 2 course and the assessment process.	Newsprint Small cards Prestik Koki's		



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		Briefly explain what the portfolio of evidence is about and that they must complete all the activities to the best of their ability.			
09h45	What is an administration system?	Ask the group what they think an administration system is. Write their different ideas on the newsprint.	Newsprint Koki's Prestik Learner manual	SO 1	Pivotal role of operating a front office. Understand your role in and contribution to administration within the organisation
10h30		Tea			
11h00	Administration system	Use the case study of the Luthando support group to help the group understand the use of an administration system better. Ask them to discuss in the group, what they think they would need their administration system for. Use the list of administration tasks in the Learner manual to help you.	Learner manual	SO1	Understand your role in and contribution to administration within the organisation



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
11h45	Knowing your community and your organisation	<p>Introduce this section to the group by using the case study in Learner manual.</p> <p>Ask each learner to answer the following questions about their own organisation's:</p> <ol style="list-style-type: none"> 1. When did your organisation start? 2. What is the aim of your organisation – what do you want to achieve? 3. Who do you provide services to? 4. What services do you provide? 5. Does your organisation have a constitution? 6. Does your organisation have rules and procedures to make it function well? <p>They might need to do this as homework as they might need to ask someone else in the organisation for more</p>		SO 1	Must have updated info on organisation



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		information.			
13h00		Lunch			
14h00	Knowing your community and your organisation	<p>Use the case study to explain what is meant by the public image of the organisation.</p> <p>Ask the group what they want the community and other stakeholders to think of their organisation. What values in the organisation are important for them to know? Discuss ways that you can improve how people see your organisation.</p>	Newsprint Koki's	SO1	<p>Understanding primary client groups in organisation</p> <p>Public face of the organisation</p>
15h15		Tea			
15h30	My role and contribution to the organisation's administration system	Use the activity in the learner manual.	Learner manual	SO 1	Able to define self in organisation and role and contribution
16h30	Closure for the day	<p>Allow learners to share what they have learnt during the session. You can also use this time to summarise all the aspects of an administration system that was covered.</p>			



Workshop – Day 2

Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
09h00	Recapping of day 1	Ask the group if they have any questions about the things that were discussed on Day 1. Clarify what is needed.			
09h15	Basic office functions	<p>Explain that the actual office and how it looks and works forms the part of the administration system.</p> <p>Ask them to brainstorm in their group what a wish list for their office would be. Think of furniture and equipment and anything else that may be necessary.</p> <p>Once they have made this wish list ask them to now look at the reality in their own organisation, in terms of the resources that are available to them. See activity in learner manual.</p>	Learner manual	SO 5	List the items needed in an office
10h30		Tea			



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
11h00	Creating a positive and welcoming environment at your office	<p>Now that the group knows the important information about their own organisations and their clients and what their office looks like, it is time to look at how they can use their office to create a positive environment.</p> <p>Divide the bigger group into smaller groups and ask each group to brainstorm and make a list of all the ways that they think one could use to create a positive and welcoming environment at the office – let them write it on newsprint so that they can give feedback to the rest of the group. Allow them 10 minutes for this. Once they have given feedback, add any other ideas to the list. Explain to the group that the next day they will be allowed to practice some of these things e.g. the right way to receive visitors etc.</p>	<p>Newsprint Koki’s Prestik</p>	<p>SO 5 SO1</p>	<p>Criteria for creating a welcoming environment Public face of the organisation</p>
12h00	Creating a positive and	Use different role plays to practice the following aspects:	Role plays	SO 5	Criteria for creating a welcoming



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
	welcoming environment at your office	<ul style="list-style-type: none"> Receiving visitors Answering the telephone Taking messages <p>Allow learners to explore the right and wrong way of doing this and how they can improve their own skills in these areas.</p>		SO1	<p>environment</p> <p>Communication is dealt with and managed</p> <p>Public face of the organisation</p>
13h00		Lunch			
14h00	Use of office equipment	<p>Explain to the group that the morning’s session will be a practical session.</p> <p>Explain how each machine works. If possible allow each person to practice.</p> <p>Give this task to them as homework – they need to go back to their own organisation and practice on the machines that they have there.</p>	<p>Different office equipment e.g. telephone, fax machine, photocopier, printer etc.</p> <p>Learner manual</p>	SO5	Demonstrate the use of basic office equipment
15h00		Tea			
15h15		Continue with equipment use if necessary.			
16h00	Closure for the day	End of the day by asking learners what they learnt. Make sure that			



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		all questions for that day have been answered. Summarise the days learnings and remind them about their homework. Ask them to also bring an example of the minutes that they keep for meetings to the next session.			



Workshop – Day 3

Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
09h00	Recapping of day 2	Make sure there are no more questions about the previous sessions.			
09h15	Basic office functions	<p>The group now needs to look at ways in which they can keep their office space neat and organised. Discuss why they think one needs a neat office.</p> <ol style="list-style-type: none"> 1. Divide the group into 3 smaller groups and ask each group to look at one of the office settings that you might find yourself in: <ul style="list-style-type: none"> • Office at someone's home • Office at the clinic or another place of work • Office that you share with another organisation 2. Let each group look at ways that you can ensure that the office space in 	<p>Newsprint Koki's Prestik</p>	SO5	Neat and ordered office space



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		<p>that particular place is kept neat and tidy.</p> <p>Give feedback to the bigger group and discuss possible solutions</p>			
10h15		Tea			
10h30	Basic office functions	<p>Explain to the group that in the same way as you have different policies and procedures for your staff and volunteers in the organisation, it is important to have some rules and procedures for the administration of your office. These rules need to look at who is accountable in terms of administration systems and what the internal rules of the organisation are. These rules need to apply to:</p> <ul style="list-style-type: none"> ● Records that need to be kept ● Correspondence ● Telephone use ● Use of office equipment and resources e.g. stationery ● Dealing with visitors 	Learner manual	SO 5	Basic administration rules and procedures are described



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		HOM EWORK: Ask the group to go back to their organisations and find out what administration rules exist in their organisation. If there are none they can sit with the rest of their organisation to develop some.			
11h30	Use basic tools for organising work	<p>Time management: Ask the group why they think it is important to manage your time at work effectively.</p> <p>Look at the different tools that are available for time management:</p> <ul style="list-style-type: none"> ● Calendars ● Work plans ● Rosters ● Checklists <p>Get the learners to practice some examples of the different tools so that they can use them back at the office</p>	<p>Learner manual</p> <p>Examples of time management tools</p>	SO 3	<p>Basic time management tools are identified and used</p> <p>Methods to manage tasks are described and used</p>
13h00		Lunch			
14h00	Keep relevant admin records	Use the case study to explain the importance of keeping documents	Learner manual	SO4	Examples of relevant records that should



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		safely. Show them the list of the relevant documents that need to be kept with the relevant timeframes	Side with documents	SO 3	be kept are identified Important documents are kept for as long as they are needed
		Ask the group if they keep minutes at their meetings and why it is important to keep good minutes. Use the example of minutes in the manual to explain how to keep good minutes.	Example of minutes in manual	SO4	Accurate minutes that capture the main points of meetings are kept
		Let them look at their own minutes and how they can improve them, based on the example.			
15h00		Tea			
15h15	Maintain a basic filing system	For your organisation to run effectively, it is important to be able to find information when you need it. A basic administration system for a small CBO might require limited files e.g. 2 or 3; a few if any.	Learner manual Examples of categories, files and labels	SO 2	Useful categories for filing are listed Ordered and accessible files are kept



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		<p>Explain the different categories that one can use for a filing system, as well as the types of files and labels available.</p> <p>Give the learners the following task to complete when they are back at their organisations. This task will be part of their portfolio of evidence.</p> <ol style="list-style-type: none"> 1. Do you have any files in your organisation at the moment? 2. Divide the files into the different categories that you have chosen. 3. Choose the type of file and labels that you want to use for your filing system. 4. Now label each file according to the right category and sub-category that you have chosen. For example <ul style="list-style-type: none"> • Administration (Red files) ○ Staff file – white label with red letters to mark the file 			<p>Current files are up to date and accessible</p>



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		e.g. ○ Office equipment ○ Inventories – stationery and office supplies			
16h30	Closure	<p>Final thoughts and closure: Bring the session to a close with a reminder of how much knowledge and experience we already have to share among ourselves. This is also the last session of the workshop and so this is a time for each participant to say how they felt about the workshop and what they learnt during the course</p> <p>Ask the participant to your right to share with the group "One new thing which I have learnt today is....."Then ask the next person to speak. Go round the circle, finishing with yourself, so that everyone has made a contribution. Ask each participant to identify one thing that they will share with someone else.</p> <p>Finish off by thanking everyone once more for coming to this</p>	Course evaluation form		



Time	Topic	Activity/ Method	Aids/ Materials	SO	AC
		session. As this is the last session ask learners to complete the course evaluation form. Explain the importance of feedback - that it will help to improve the way you facilitate as well as the content of future workshops			



ADDITIONAL INFORMATION

List of training aids

For this training it would be very good if you can get as many examples of actual material used in an office and administration system to show learners. This will help to make the training more practical.

Suggested training aids:

- Examples of different message books – can be bought from a stationery shop
- Example of book to be used for minutes
- Examples of different types of files for a filing system:
 - Ring binders
 - Paper files and/or cardboard files (different colours)
 - Hanging files
 - File boxes
 - Plastic flip files
- File dividers
 - Alphabetical
 - Months
 - Colours



- File labels
 - Labels for hanging files

- Templates of examples of different forms and records in manual
 - Calendar
 - Checklist
 - Message slip
 - Fax cover sheet
 - Minutes and agendas

- Sides for Power point presentation (see attachment)



Course evaluation form

Date: _____

Facilitator/ s: _____

What did you like about the course?

What part of the content was most useful to you?

What was not useful to you?



What did you not like or would change about the course?

Please rate the following (circle or underline your choice):

Facilitation	Excellent	Good	Not Good
Pace	Perfect	Too fast	Too slow
Content	Appropriate	Not appropriate	

Do you have any other comments or feedback for the facilitator/ s?

What support would you like in implementing the learnings from this course?



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