

Implement and maintain basic administration systems of a CBO Level 4

- 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.

ACKNOWLEDGEMENTS

The Development Practice Project wishes to acknowledge and thank the following contributors:

- [Investec](#) for providing principle funding
- [C.S. Mott Foundation](#) for providing seed and continued funding
- Karin Webber of DTF Solutions for researching and compiling this set of learning materials
- The partner organisations who contributed their materials
- The many other thinkers, writers, and published works that contributed indirectly to this product
- The project team for logistics, coordination and editing

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



LICENSING

These works are licensed under a Creative [Commons Attribution Non-commercial-Share Alike 3.0 Unported License](https://creativecommons.org/licenses/by-nc-sa/3.0/).

ATTRIBUTION NON-COMMERCIAL SHARE ALIKE (BY-NC-SA)



- ⓘ **Attribution.** Others can copy, distribute, display, and perform the copyrighted work — and derivative works based upon it — but only if they give credit the way it is requested.
- Ⓜ **Non-commercial.** Others can copy, distribute, display, and perform this work — and derivative works based upon it — but for non-commercial purposes only.
- ♻️ **Share Alike.** Others are allowed to distribute derivative works only under a license identical to the license that governs this work.

CONTENTS

What is facilitation?	6
Your role as the facilitator is to:.....	6
Key principles of facilitation	7
Do's and don'ts of facilitation	8
Critical skills of a facilitator	9
Qualities of a facilitator	10
The difference between facilitation and presentation	10
Tips for being a good facilitator	11
OVERVIEW	12
SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA	13
IMPROVING AND MAINTAINING BASIC ADMINISTRATION SYSTEMS OF A CBO (LEVEL 4) - COURSE PLAN	16
Workshop – Day 1	16
Workshop – Day 2	22
Workshop – Day 3	27
Workshop – Day 4	31
ADDITIONAL INFORMATION.....	37
Note to facilitator	37
Introductions.....	37
Basic office functions: Creating a welcoming environment at the office	38
Basic office functions: Creating a welcoming environment at the office – Activity 2	39
Basic office functions: How to use office equipment	42
Day-to-day record keeping: Agendas and minutes.....	43
Setting up a filing system	45
Course evaluation form.....	47

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 – Implement and maintain basic administration systems of a CBO (Level 4). The manual provides information that will assist you to help learners to develop skills and acquire knowledge to run a more effective administration system in their CBO.

What you will cover in this course

This course consists of the following:

1. Basic office functions
2. Basic tools for organising your work
3. Day-to-day record keeping
4. Setting up and maintaining basic filing systems



SPECIFIC OUTCOMES AND ASSESSMENT CRITERIA

Specific outcomes	Assessment criteria
<p><i>Competence in this standard means that the learner has clearly shown that s/he is able to...</i></p>	<p><i>Tasks and activities completed by the learner contain the following evidence of competence...</i></p>
<p>1. Set up and maintain a basic filing system</p>	<ol style="list-style-type: none"> 1. Useful categories for a filing system are identified (funders, staff, organisational documents) 2. Ordered and accessible files are kept (labelling, use of file dividers, alphabetical ordering etc) 3. Current files are up to date and accessible 4. Legal requirements for record keeping are explained and complied with (Retention period for documents; Types of documents; Approval of minutes etc) 5. Important and legally required documents are archived (for up to 5 years) and kept accessible (Reports; Board Minutes; Contracts; Financial records; significant correspondence etc) 6. Ways to improve and streamline filing systems are identified.
<p>2. Use basic tools for organizing work</p>	<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

	<p>lists, checklists, rosters, job lists etc)</p> <ul style="list-style-type: none"> • Advantages and disadvantages of different tools are discussed.
<p>3. Keep relevant day-to-day records</p>	<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, significant correspondence etc)
<p>4. Manage basic office functions</p>	<ul style="list-style-type: none"> • List items needed in a basic office (stationary, telephone, desk etc) • A neat and ordered office space is maintained (within the constraints of the under-resourced environment) • 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) • Administrative rules and procedures are described and documented when necessary

Assessment can be based on a combination of simulated activities, workplace tasks and observation of actual administrative systems in place.

The information in brackets suggests but does not limit an appropriate range of criteria for assessment



A basic administration system at this level would include: files covering a number of different activities and or projects; staff records; minutes of different meetings; correspondence with different stakeholders; more than 1 funder. The learner at this level should be able to set up and adapt a system.

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



IMPROVING AND MAINTAINING BASIC ADMINISTRATION SYSTEMS OF A CBO (LEVEL 4) - COURSE PLAN

Workshop – Day 1

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Welcome, expectations and overview of course	<p>Welcome and introductions: Do an introduction activity with the group to allow the group to get to know each other and the facilitator.</p> <p>Group contract: If you feel it is necessary then set a group contract with the group that will outline the way in which people will participate. Encourage group members to add their own rules to the contract. Learners must also feel safe to share and ask questions.</p> <p>Expectations and Overview: Give the learners an opportunity to state their expectations for the course. Use this to introduce the different modules that will be</p>	<p>Nametags Coloured cards Koki's Newsprint Prestik</p>		



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>dealt with and also to ensure that they know what will not be covered. Explain the outcomes of this Level 4 course and the assessment process.</p> <p>Briefly explain what the portfolio of evidence is about and that they must complete all the activities to the best of their ability.</p>			
09h45	Basic office functions	<p>Introduce the topic by asking the group what they think an administration system in an organisation is and why it is important to have such a system. See definition of administration system in Learner manual.</p> <p>How to create a welcoming environment at the office: Explain to the group that we have now come to the most important part of the administration system and that is putting it all to practical use in the way that we run our office and the image that</p>	Learner manual Newspaper Koki's Prestik	SO4	Criteria for creating a welcoming environment are listed



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>our office projects to those who use it.</p> <p>The atmosphere that one creates in your office is very important and it is often the first step to building relationships with people who use the service or come to visit the organisation. It is important to create a positive image of the organisation through the way your office looks and operates.</p> <p>See detailed activity.</p>			
10h45		Tea			
11h00	Basic office functions	<p>CBOs may have their offices in different settings. The office might be in someone's home, it might be at the local clinic or they might share an office with another organisation. Keep this in mind, as well as the fact that CBOs have limited resources, ask the group to brainstorm what they think one needs in a basic office in terms of furniture, equipment and stationery.</p>	<p>Newsprint Koki's Prestik Learner manual</p>	SO4	List items needed in a basic office



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>Once they have made the list and given feedback, add any items that they might have left out.</p> <p>Also discuss the issue of security with the group – see Learner manual.</p> <p>Each learner can also look individually at what they have in their organisations at the moment and what they might still need.</p> <p>In the smaller groups ask the group to discuss what they can do if they have very limited resources to get the things they need e.g. sponsorships or donations.</p> <p>Have a discussion about the possible solutions in the bigger group based on the small group's input.</p>		SO4	<p>List items needed in a basic office</p> <p>Neat and ordered office space is maintained (within the constraints of the under-resourced environment)</p>
13h00		Lunch			
14h00	Basic office functions	Divide the group into 3 smaller groups and get each group to	Newsprint Koki's	SO4	Neat and ordered



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>look at one of the scenarios of where a CBO might have its office:</p> <ul style="list-style-type: none"> • Office at someone’s home • Office at the clinic or community centre • Office that is shared with another organisation <p>Let each group look at the challenges that there would be to keep their office space neat and ordered in that specific setting. Let each group also look at ways that they can ensure that the office space is kept neat, despite these challenges.</p> <p>Each group can then give feedback to the bigger group about the possible solutions. Add any other solutions to the discussion if necessary.</p>	Prestik		office space is maintained (within the constraints of the under-resourced environment)
15h00		Tea			
15h15	Basic office functions	<p>How to use office equipment: See detailed activity below.</p>	<p>Different types of office equipment:</p> <ul style="list-style-type: none"> • Telephone • Fax machine 	SO4	Demonstrate use of basic office equipment



Time	Topic	Activity/Method	Aids/Materials	SO	AC
			<ul style="list-style-type: none"> • Computer and printer • Photocopier Learner manual		
16h30	Closure for the day	<p>Final thoughts: Share any final thoughts with the group.</p> <p>Brief evaluation: Ask the group for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for the next day.</p>	Post-its Koki's Newsprint		



Workshop – Day 2

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 1	Thoughts and ideas from the previous day			
09h15	Basic office functions	<p>Divide the group into smaller groups. Each group will look at the best way to :</p> <ul style="list-style-type: none"> • Answer the phone and deal with clients or other people on the phone • Take messages for someone who is not in the office at the moment • Deal with correspondence that has come to the organisation i.e. a letter and a fax <p>See detailed activity below.</p>	<p>Newsprint Koki's Prestik Role play scenarios</p>	SO4	Communication is dealt with and managed responsibly
10h15		Tea			
10h45	Basic office functions	<p>Rules and procedures for administration systems: In the same way that an organisation has policies and procedures for management of staff and volunteers, there should be certain rules and procedures</p>	<p>Learner manual Newsprint Koki's Prestik</p>	SO4	Administrative rules and procedures are described and documented when necessary



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>that make the administration system function well.</p> <p>Ask the group what they think the different aspects are that there needs to be rules or procedures for in terms of the administration system. Make a list on newsprint. The list should include:</p> <ul style="list-style-type: none"> • Records to be kept • Correspondence • Telephone • Visitors • Smoking • Dress code <p>Let each learner look at their own organisation and identify which of these they have rules for. If they do not already have rules, then they can start to develop the relevant rules and procedures.</p> <p>Remind them that it is important that rules need to be discussed with all staff and volunteers and that they can take this task further when they are back at their organisation. This will</p>			



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		ensure that the process is participatory and everyone can give input.			
12h30		Lunch			
13h30	Basic tools for organising your work	<p>it is important to look at the other tools needed to ensure that the overall administration system works well.</p> <p>Time management: Ask the group to brainstorm in their smaller groups what time management is and then to give feedback to the bigger group. Ask the group to also list reasons why good time management is important if you are going to run a good administration system in your CBO.</p> <p>Give the definition in Learner manual and any other input that is necessary as a summary to this discussion.</p>	<p>Newsprint Koki's Prestik Examples of different planners and forms Learner manual</p>	SO2	Basic time management tools are identified and used
15h00		Tea			



Time	Topic	Activity/Method	Aids/Materials	SO	AC
15h15	Basic tools for organising your work	<p>There are a number of tools that learners can use to manage their time better.</p> <p>Ask them for suggestions as to how they think they could manage their time more effectively. Write these ideas on the newsprint.</p> <p>Add any other ideas from the list.</p> <p>Look at the different time management tools that exist:</p> <ul style="list-style-type: none"> • Diaries • Calendars • Time tables and planners <p>Ask learners to look at the examples of the tools that can be used to manage time better and to make a list of the ones they are using at the moment.</p> <p>If they are not using any of these tools at the moment, which do they think would assist them best to manage and plan their time better?</p>	<p>Newsprint</p> <p>Koki's</p> <p>Prestik</p> <p>Learner manual</p> <p>Examples of dairies, calendars and other planners</p>	SO2	Basic time management tools are identified and used



Time	Topic	Activity/Method	Aids/Materials	SO	AC
16h30	Closure for the day	<p>Final thoughts: Share any final thoughts with the group.</p> <p>Brief evaluation: Ask the group for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for the next day.</p>	Post-its Koki's Newsprint		



Workshop – Day 3

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 2	Thoughts and ideas from the previous day			
09h15	Basic tools for organising your work	<p>Explain to the group that there are also other methods that can be useful to manage your tasks better such as:</p> <ul style="list-style-type: none"> • To-do-lists • Checklist of activities • Rosters for work • Job lists <p>Ask learners to choose an activity that they need to complete as part of their job e.g. organise the next Board meeting.</p> <p>Ask them to make a to-do-list of all the tasks that need to be done for this activity.</p> <p>Together with this, make a checklist where you can tick off the tasks that you have completed.</p>	Learner manual	SO2	Methods to manage tasks are described and used
10h30		Tea			



Time	Topic	Activity/Method	Aids/Materials	SO	AC
11h00	Basic tools for organising your work	<p>Discuss the advantages and disadvantages of each of the different tools and methods that the group learnt about this morning:</p> <p>Also ask the group which of the methods they think would be most relevant for their particular organisation and how they would apply it.</p>		SO2	Advantages and disadvantages of different tools are discussed
11h45	Day-to-day recordkeeping	<p>Agendas and minutes: Part of a good administration system is being able to have regular, effective staff meetings with a clear agenda and good minutes from previous meetings. Good minutes are an important part of the day-to-day records that need to be in every organisation.</p> <p>Use the examples to look at drawing up an agenda and taking minutes.</p>	Learner manual	SO3	Accurate minutes that capture the main points of meetings are kept



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		Use a role-play to practise all the skills learnt during this activity. See detailed activity below.			
13h00		Lunch			
14h00	Day-to-day recordkeeping	<p>Other relevant records: There are a number of other records that need to be kept as part of a good administration system. Some of these records are for legal purpose and some of them can assist with the smooth running of the organisation.</p> <p>Share the list of records with the group. Prepare newsprint with the list before the session. Ask the group to add any other records that they feel may be necessary. Get each learner to use the checklist in the learner manual to look at the records that they have in their own organisation. Once they have identified which records they have, let them look at the ones that they may still need.</p>	<p>Newsprint Koki's</p> <p>Learner manual</p> <p>Checklist in Learner manual</p> <p>Learner manual</p>	SO3	Examples of relevant records that should be kept are provided



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		They can then use the examples in the Learner manual to develop records for their own organisation.			
15h30		Tea			
15h45		Continue with activity if necessary			
16h00	Closure for the day	<p>Final thoughts: Share any final thoughts with the group.</p> <p>Brief evaluation: Ask the group for feedback about what they experienced and learnt during the day – what did they like, not like; or would like to change for the next day.</p>	Post-its Koki's Newsprint		



Workshop – Day 4

Time	Topic	Activity/Method	Aids/Materials	SO	AC
09h00	Recapping of Day 3	Thoughts and ideas from the previous day			
09h15	Setting up and maintaining basic filing system	<p>Ask the group to think of the following questions:</p> <ul style="list-style-type: none"> • Do they have a filing system in their organisation? • Where do they keep their files and documents? <p>Explain to the group that there are different ways in which one can organise filing systems e.g. categories or alphabetically. We are going to look at different categories that can be used for filing documents and other records. See detailed activity below.</p>	<p>Newsprint Koki's Prestik Learner manual</p>	SO1	Useful categories for a filing system are identified
10h30					
11h00	Setting up and maintaining basic filing system	Now that learners have identified the different categories that they will use to organise their documents, they need to look at	<p>Examples of different files and labels Learner manual</p>	SO1	Ordered and accessible files are kept



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>how to organise the files in terms of types of files and labelling.</p> <p>Show the group different types of files and labels. Discuss with the group the different ways in which each file can be used and what the advantages and disadvantages of each are.</p> <p>Remind the group that the type of file they choose needs to be appropriate for the amount of filing that they have as well as the space they have available to keep files in.</p> <p>Ask each learner to look at the files/documents that they currently have in their organisation.</p> <p>Ask them to now organise these files into the categories that they chose in the previous activity.</p> <p>They then need to choose the right type of file and labelling system for their files.</p>			<p>Current files are up to date and accessible</p>



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		This is a practical activity where learners can then file and label their documents in the training. They can also complete this task as a homework assignment.			
13h00		Lunch			
14h00	Setting up and maintaining basic filing system	<p>Legal requirements: The legal requirements for keeping different documents vary according to the type of document. Go through the different documents and the timeframes that need to be adhered to as explained in the Learner manual. Answer any questions that learners might have regarding this. Also explain to the group the concept of archiving and why this is an important part of keeping a good administrative system in the organisation.</p> <p>Divide the group into smaller groups and ask each group to</p>	Learner manual	SO1	<p>Legal requirements for record keeping are explained and complied with</p> <p>Important and legally required documents are archived and kept accessible.</p>



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		<p>make a list of the documents they have in their organisations and look at the time period these need to be kept for. They can use the table in the Learner manual as a guide.</p> <p>Let the group also identify any documents that they think need to be placed in the archive.</p> <p>Ask the group to look at practical places where an archive can be kept for CBO information that would be easily accessible to anyone who needs the information.</p>			
15h00		Tea			
15h15	Setting up and maintaining basic filing system	Give learners the Individual activity in the Learner manual to complete.	Learner manual	SO1	<p>Current files are up to date and accessible</p> <p>Ways to improve and streamline filing systems</p>



Time	Topic	Activity/Method	Aids/Materials	SO	AC
					are identified
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 your own, 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 session.</p> <p>As this is the last session ask</p>	Course evaluation forms		



Time	Topic	Activity/Method	Aids/Materials	SO	AC
		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

Note to facilitator



Important thought

If you are able to contact the learners who will attend this course beforehand, please ensure that they bring documents and files that they need to organise with them so that they can use their own material as part of the practical sessions.

Many of the activities can also be given as practical homework assignments to ensure that learners are really able to carry out tasks effectively.

Introductions

Purpose:

- To allow learners to get to know the other participants in the group
- To encourage a positive learning environment where learners share and take risks

Time required: 30 minutes

Materials: Newsprint, prestik, koki's, name tags or labels

There are many different activities that can be used for learners to introduce themselves to the group. Here is a suggestion.



Positive labels

1. Give each learner a large label and a koki.
2. Ask them to write their name on the label and a positive word that describes them. They can then stick the label on their chest so that everyone can see it. For example Kind Karin or Strong Simon.
3. To make it easier you can tell learners that they can use any language for the positive words.
4. Ensure that all the labels are positive. Ask each member of the group to share their positive label and name with the people on either side of them and to explain briefly why they chose those particular descriptions of themselves.
5. The facilitator can introduce him/herself to the group in the same way.

Basic office functions: Creating a welcoming environment at the office

Purpose:

- To allow learners to learn and practise skills to create a welcoming environment at work
- To look at ways that they can improve their office space

Time required: 2 hours

Materials: Newsprint, Koki's, prestik

1. Ask learners to look at their organisations and then to use the following questions to discuss how and what they need to do to improve the atmosphere in their office.



- What does the organisation stand for and what do we want people to know about it?
 - What are the main services we provide and how do we make it accessible to people?
 - What do we want people to feel when they come into our office or use our services?
 - Who are our main clients and what will make them comfortable/uncomfortable?
 - What is the first thing we want people to notice when they come into our office?
 - Who will receive visitors?
2. Ask them to answer each question. Let them give feedback about their organisations in the bigger group and allow for discussion and questions.
 3. Remind learners to keep their answers practical so that they are able to go back to their organisation and implement what they have set out to do in this activity.

Basic office functions: Creating a welcoming environment at the office – Activity 2

Purpose:

- To allow learners to learn and practise skills to create a welcoming environment at work
- To look at ways that they can improve their office space



Time required: 60 minutes

Materials: Newsprint, koki's, prestik
Role play scenarios

1. Divide the group into smaller groups and ask each group to look at the best way to do one of the following:
 - Deal with clients or other people on the phone
 - Take messages for someone who is not in the office at that moment
 - Deal with correspondence that has come to the organisation i.e. a letter and a fax
2. You can also give each group a role play around the specific issue and ask them to role play the situation to the group. Ask the other group members to then give feedback about the role play and any suggestions on what they could have done differently or how they could further improve on the specific aspect.



Important thought: Using role plays

When people pretend to be someone else and speak like someone else, they are role-playing and imitating.

Role-plays may be used to:

- liven up a story
- cover a message

Remember a role play does not always have to be performed to an outside audience. Important learning experiences can take place if the drama is used in the classroom or with a small group (like a drama club). Often role-plays are not performed to anyone, although important learning has taken place in the process of acting out a problem and working out the solution.

Basic office functions: How to use office equipment



Important thought

Ask learners to check if they have any instruction booklets on the various office machines that they may have in their organisation. If they have any they need to bring it with to the training session.

Purpose:

- To allow learners to learn and practise how to use basic office equipment

Time required: 2 ½ hours:

Materials: Different types of office equipment

- Telephone
 - Fax machine
 - Computer and printer
 - Photocopier
1. Explain to the group that people may be using different office equipment in their offices. Some people may be very familiar with the machines and how they work, but some people might need to learn and practice. In this session we are going to look at the theory and practical side of using different machines/equipment in the office.

2. Use the information in Learner manual to look at the theory of using different office equipment. Make sure to demonstrate the theory on each of the machines during the training.
3. If learners have these machines at the office they can practice there as well once they have left the training. Maybe they will have to ask another organisation to use their equipment if they do not have their own.
4. If learners have brought the instruction booklets of the different machines at their organisation with them, they can use them now to practice how to use their specific machine. Even though the machine might not be at the training they need to be sure that they understand the instructions and are able to perform them correctly.

Day-to-day record keeping: Agendas and minutes

Purpose:

- To allow learners to acquire and practise effective listening skills
- To examine the importance of good listening skills when managing staff
- To help learners to demonstrate consultation with staff.
- To ensure that learners know how to run meetings effectively, take minutes and draw up an agenda

Time required: 60 minutes

Materials: Role-plays

Example of Agenda (Learner Manual)



Example of Minutes (Learner Manual page 68)

1. Part of having an effective administration system is to have regular meetings with a clear agenda and good minutes from the previous meeting to guide the present one.
2. Brainstorm in the group the different types of meetings that take place in their organisations e.g. team meetings, staff meetings, board meetings etc. For each of these meetings there should be accurate minutes taken.
3. Divide the group into smaller groups. Ask each group to draw up an agenda for one of the following meetings:
 - Monthly staff meeting
 - Home-based care volunteers meeting of 12 people in order to receive information on nutrition
 - Open community meeting in order to discuss a project to start a food garden and look for volunteers (50 – 100 people to attend meeting)
4. Draw up the agenda so that the meeting is not longer than one hour. Give each group a piece of newsprint on which to draw up their agenda so that it can be discussed during the feedback session. They can use the example on page 66 in the Learner manual as a guide.
5. After each group has presented their agenda.
6. One of the other important tasks in a meeting is to take good minutes during the meeting. Ask the group to list:
 - why minutes should be taken



- what has to be in the minutes
 - are any documents or other input required
 - how to correct any discrepancies in minutes
7. Let the learners use the example in Learner manual to practice minute taking.
 8. End the activity with a role-play where the different group members can get a chance to prepare for the meeting, conduct the meeting and take minutes.

Setting up a filing system

Purpose:

- To assist learners to identify different and useful categories for a filing system
- To allow learners to develop ordered and accessible files and labelling systems

Time required: 90 minutes

Materials: Newsprint, prestik, koki's

1. Go through the different categories that can be used for organising the different documents that exist in the organisation, e.g.

The main categories for a filing system could be:

- Administration
- Legal information
- The Board



- AGM
 - Other meetings
 - Finances
 - Donors / Funders
 - Programme information
 - Partnership information
2. Let learners look at the main categories that are given in the example above. Which of these categories would be relevant to your organisation?
 3. Ask them if they think they need to add any categories to this list? If so, let them make a list of all the categories that they would use in their filing system for their organisation. Include the different sub-categories that go with each main category.
 4. Remind learners that if their organisation is very small they might not have as many categories as someone from a larger organisation. Each learner needs to develop the categories that are relevant for their specific organisation.

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?
