idasa
AN AFRICAN DEMOCRACY INSTITUTE

FROM IDEA TO ACTION

A study circle workbook on starting and running a project

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Introduction

There are many problems and challenges in the world today, including in South Africa, such as poverty, unemployment and meeting basic human rights such as water, housing, healthcare and education. Many concerned South Africans start projects in response to one of these, or to a similar issue. Sometimes a concerned group of citizens does very good work, but has not thought about what they do as a 'project' and about all the things that go into a project. Sometimes a project needs funding to survive, and people are then asked to explain their project in order to get funding from a donor.

Even though not all projects are about earning an income, there is increasing pressure on many South Africans who cannot find employment in the formal economy to start and run their own projects as a way of earning an income.

So, we hope that this study circle material will assist those of you who are already running a project or would like to start running a project, with ideas about how to do this, or how to do it better.

The workbook begins with looking at what a 'project' is. Then it focuses on the 'project cycle' that all projects go through. A project cycle is very important as it helps you to constantly reflect on your project, and learn from what is happening with it.

Then the manual highlights 'project planning' and the importance of this part of the 'cycle'. Then it moves to 'monitoring and evaluating' projects, another important stage that helps you to know what is working well and what is not. You can also then make changes to the project, if need be.

The manual ends with looking at what makes a project successful and sustainable. Throughout the manual, we look at what is going on in the 'bigger picture' as a way of understanding the context or circumstances in which we live – this includes the local, national and global contexts, as all of these play a role in our lives (and projects), even if we are unaware of this.

Objectives

After attending all nine study circle sessions, participants should have developed a thorough understanding of, and be able to critically reflect on, the following:

- What a 'project' is;
- The 'project cycle';
- Project planning;
- Monitoring and evaluating projects;
- Why some projects succeed and others fail.

This workbook contains:

- Guidelines for nine study circle meetings;
- Tasks to do between meetings;
- Suggestions for how study circle members can move forward with their own projects.

This manual was produced by Idasa, an independent African public-interest organisation that promotes sustainable democracy based on active citizenship, democratic institutions and social justice.

Idasa promotes study circles as a tool for citizens to empower themselves with knowledge and skills in order to become effective agents of change and development. Idasa believes that non-formal learning opportunities should be encouraged and valued in communities, alongside the formal education that takes place in schools and other educational institutions. For democracy to flourish, citizens need to develop the confidence and capacity to pursue learning that deepens their understanding of the world they live in and the role they can play in changing it.

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What is a study circle?

Important: Read this section if you have never participated in a study circle, or if you have not been trained as a study circle leader.

A study circle is a small, informal group formed by people who are interested in learning more about a particular subject together. A study circle is also for people who want to help solve public problems and build a better society.

Here are a few key facts about study circles:

- Groups meet once a week, for 8 to 12 weeks;
- Meetings last for 2½ to 3 hours;
- Members can shape the study to meet their interests;
- Members' experiences are the foundation for learning;
- Taking action deepens understanding and builds power.

How many people can join a study circle?

Usually a study circle has eight to ten members. It can be a little smaller or a little bigger, but it should not be too small or too big. It must be big enough so that there are lots of different ideas to share, and small enough so that everyone can participate easily.

Who can join a study circle?

Anyone can become a member of a study circle, if they are interested in the subject of the study. You do not have to be well-educated to participate in a study circle. You do not even have to be able to read. Study circles are for everyone, from any background.

Who can be a study circle leader?

Anyone can lead a study circle. The study circle manual contains instructions to guide the leader and the group. Circle members decide together what they want to do, and can share the work of leading the circle. It is possible to receive training on how to be a study circle leader. If you are interested in this, contact Idasa at (012) 392 0500.

What is the role of the study circle leader?

When people work together in a group, it is always useful for someone to take the lead. Without a leader people feel unsure about what to do and time is wasted. The study circle leader usually sets up the study circle and convenes the first meeting. The same person can lead all the study circle meetings, or other members can volunteer to lead meetings too. It is up to the group to decide.

Here are some key principles for every study circle leader to remember:

- The leader is also a learner, like all the other members of the circle;
- The leader is not a teacher or an expert;
- The leader helps members to focus on the task and keep time;
- The leader encourages everyone to take part in the discussions;
- The leader encourages members to be accountable to one another.

What is the role of study circle members?

A study circle is different to a classroom where the teacher does all the work! Study circle members play an active role in the learning process. The success of the study circle depends on the contribution of every member.

A study circle works well when the members agree to do the following things:

- Attend every meeting;
- Participate actively;
- Share questions, experiences, ideas and resources;
- Listen carefully;
- Respect the views of other members and appreciate their contributions;
- Disagree respectfully with others, and be open if they disagree with you;
- Do tasks between meetings.

Where should a study circle meet?

A study circle can meet anywhere in a place that is convenient for the members. Someone's home, a corner in a church hall, or an open space under a tree are all suitable. Ideally, the meeting place should be flexible and informal. Desks are not necessary. Arrange chairs in a circle to create a comfortable atmosphere where everyone is equal.

When do study circle meetings happen?

Study circle meetings can happen at any time that suits the members – morning, afternoon or evening. It works best to meet once a week, at the same time.

How long is a study circle meeting?

Study circle meetings usually last about 2½ to 3 hours, including a short break. The group can also decide to meet for a shorter time, but then it will cover less material.

For how long do study circles continue to meet?

It is helpful for a study circle to take a break after 10 or 12 meetings. This is a manageable commitment for most people. After this, members should be allowed to leave the group if they have other commitments. The study circle can continue working on the same topic after the break, with a new set of objectives. New study circles can also be created to study different subjects.

What resources are needed to run a study circle?

Study circles are a way for people to educate and empower themselves, using whatever resources they have. You do not need money to create a study circle. A lack of resources should never be an excuse for not running a study circle!

To run a study circle you need:

- Members with a strong, shared interest in the subject of study;
- Energy and commitment to discover learning resources in unexpected places;

- Study circle manuals for every member, if they are available;
- Other materials such as newspaper articles, booklets published by NGOs, library books, videos or DVDs that are relevant to the subject of study;
- A suitable meeting place;
- Simple refreshments, if possible.

What is the origin of study circles?

People have used this approach to learning for over 150 years, especially when they have not had access to formal education. People's movements in places as far apart as Sweden, the USA, India, Brazil and South Africa have all used study circles and other similar methods to build the capacity of poor and marginalised people to play an active role in changing their society.

What makes study circles different?

Study circles promote an open, democratic approach to learning that is different to what happens in schools, colleges and universities. Study circle members set their own learning goals. They help to shape the study circle process to achieve these goals. The leader is also a learner and does not dominate the group. Everyone in the circle is equal and his or her experience forms the foundation of learning. Members join the study circle because they want to, not because they have to.

Why join a study circle?

Join a study circle because you are hungry to learn and you want to be an agent of change in your community. Study circles make it possible to learn about life, from life, throughout life.

How to set up a study circle

Recruit members

The most important task when setting up a study circle is to find people who are strongly motivated to learn about the chosen subject and take action with others. Take time to recruit the right people. This will help to ensure that study circle members do not drop out later.

Here are some tips for recruiting study circle members:

- Listen carefully to identify people's interests;
- Don't force people to join or ask them to do you a favour by coming along;
- Give people a clear idea of what they can expect from the study circle:
  - Explain what a study circle is, how it works and how long it lasts;
  - Explain the focus of your study circle;
- Share the vision of lifelong learning;
- Speak to all potential members yourself – don't just ask people to bring a friend;
- Try to create a diverse group, with people from different backgrounds;
- Only involve people who can commit themselves to meeting for 10 or 12 weeks in a row.

Identify a meeting place and time

Find a suitable place for the study circle to meet. Above all, it should be accessible to members. Also decide on which day of the week the circle will meet, and at what time. You should consult some members beforehand, although it might be impossible to satisfy everyone. The time and the place will influence whether people are able to join the study circle.

Obtain materials

If you plan to use a study circle manual, get copies for all members. Study circle manuals can be obtained from Idasa by phoning (012) 392 0500. You can photocopy Idasa manuals if you do not have enough copies. Also look out for other materials such as books, videos or newspaper articles that can guide and enrich your study.

Plan the first meeting

If you set up a study circle yourself, then usually you will run the first meeting. If not, identify a suitable leader and plan the meeting together. At the first meeting, members will discuss their expectations and agree on the goals they want to achieve together. These goals should help to shape everything else that happens in the study circle, right to the end. Make sure that the first meeting is interesting so that people are motivated to return!

How to run a study circle meeting

Prepare

All study circle members should prepare for the meeting ahead of time. The leader must read all the materials and plan the structure of the meeting. Other members must do any tasks that were allocated or suggested at the end of the previous meeting.

Adapt

The study circle manual provides a guide for the meeting. You can follow it closely, or you can adapt it. Everything depends on the goals of your group. You can decide to spend longer on certain sections than on others, or drop some sections altogether. You can also use materials from different sources to enrich the study and to help you meet your goals. Discuss these changes together and decide what will work best for your study circle.

Relax

Take a short break after about 1½ hours. Share some simple refreshments at this point, if they are available. Even a glass of water is good. Study circle members can take turns to provide simple refreshments, if they are able to do so.

Evaluate

The study circle belongs to the members. Evaluate every meeting to make sure that you are achieving your goals. It takes time and effort to learn to work together effectively in a study circle. Recognise positive contributions. Hold each other accountable to the commitments you make. Strive to make each meeting better than the one before. If you set high standards for yourselves, you will be impressed by what you can achieve together.

IMPORTANT NOTE – READ THIS BEFORE YOU START

Make this study circle workbook work for you

This is not a textbook. The notes are there for you to discuss. Feel free to ask questions about what you read and to disagree. The workbook is meant to get you thinking and talking as a group. There are many questions for discussion. You can use these as a guide, but you don't have to use them all. Your own questions are even more important!

There is quite a lot of space in this workbook for you to write down your ideas, but you don't have to be able to write in order to participate in the study circle. It is also fine to talk through the exercises, while just a few people write. It is good to capture some of the ideas in the group.

In some of the meetings there is quite a lot to read. Feel free to choose some readings and to leave out others. You know best which information is most important for you. You can read the other notes at home. You can also bring extra readings from books or newspapers to share with the rest of the group.

Take a bit of time each week to prepare for the next meeting. This is important. Remember that starting and running a project is not just about you. Between meetings, talk with your family, friends and neighbours about how they see things in your community. Your homework is to chat and listen to others. There are questions at the end of each meeting to guide you, but you can ask all kinds of other questions too.

Meeting 1: Starting and running a project

> *Suggested time for every meeting is 3 hours, including a 30-minute break halfway through.*
>
> *Note: Times in brackets are just a guide.*

STEP 1:

Welcome and introductions (10 minutes)

To get started, introduce yourselves to each other. Give your name and briefly say a few things about yourself, for example:

- What organisation you are from (if any);
- Where you live;
- How long you have lived in this community, and what you like about it;
- Action you have taken (if any) to improve the community.

STEP 2:

Practical arrangements (30 minutes)

Look through the introduction to the manual, especially the following points on pages vii and viii

- The role of the study circle leader;
- The role of the study circle members.

Ask any questions you have about these roles and clarify them for each other.

Make sure that everyone understands and agrees how the study circle will work. Confirm the practical arrangements for the study circle, and ensure that they suit all the members:

- Meeting time;
- Venue;
- Length of meetings;
- Number of meetings;
- Language.

Questions for discussion:

- Are you able and committed to attend all the meetings of the study circle?
- Do you understand why it is important to attend all meetings?
- What support can you give to each other to ensure that everyone attends the meetings?
- How will you hold each other accountable?

STEP 3:

Goals (30 minutes)

Decide on your goals for the study circle. You can look at the objectives that have already been developed (see page v). Feel free to add to these or change them. The following questions will help you to identify your goals as individuals and as a group.

Questions for discussion:

- Why have you joined this study circle on starting and running a project?
- What do you want to learn by taking part in this study circle?
- What would you like to achieve together as a group?

After all the discussions, write the goals of your study circle in the space below. Check these goals each time you meet. Use them to help evaluate your progress.

_____

_____

_____

_____

_____

_____

_____

Are there correct answers or 'solutions' to the questions in this manual? Most of the time, the questions invite you to give your own ideas about something. As study circle members, you do not all have to agree with each other. The discussion can sometimes be more interesting if you disagree!

As you go through the material, remember that it may not always be easy to find answers. But asking questions and exploring them together is often just as

useful as finding answers. Sometimes answers lead to more questions, so don't stop asking them. You can use the questions in the manual, but you should also ask questions of your own at any time.

Remember! You do not have to follow this manual step by step. You can if you want to, but feel free to leave out parts that you do not want to use, or to include other useful material instead.

STEP 4:

What is a 'project'? (35 minutes)

What do you understand by the word 'project'? Working on your own, quickly write a few words that come into your mind when you think about the meaning of 'project'. Use the space below.

_____

_____

_____

_____

After a few minutes, let everyone in the circle share the words they have written. Have a short discussion about the different understandings of 'project'. Then read the passage below and talk about it together.

The word 'project' originally came from Latin. It meant 'a plan that comes before anything else happens'. When the English language adopted this word, it kept this meaning of planning something, but *not* actually carrying it out. However, in the 1950s the meaning of 'project' changed and we now use it to talk about making a plan *and* carrying out the plan.

We will look at 'planning' and 'carrying out the plan' (that is, the project cycle) in the next meeting.

Sometimes people **distinguish** between a *project* and a *programme*. A project is smaller than a programme and usually has a **defined** starting and ending point with **specific** objectives. Once the project objectives have been achieved, it is complete and it ends.

A programme is bigger than a project and is usually made up of a group of related projects managed in a **co-ordinated** way to **obtain** results that are not usually possible if a project is managed on its own. Bigger organisations often run programmes that include several projects. Together these projects achieve broader objectives, some of which may be ongoing (that is, they do not end at a particular point, like a specific objective).

Useful words you might not know

co-ordinated – combined / harmonised / working together
defined – definite / clear
distinguish between – draw a line between / mark the difference between
obtain – get / achieve
specific – definite / particular / exact

STEP 5:

Sharing project experiences (35 minutes)

Take some time to tell each other about your own experience with projects. Use the following questions to guide you.

Questions for discussion:

Are you already involved in a project in your community? Or do you know about a project that is happening? If so, tell the group about it. Some points to include are:

- What does the project deal with?
- How long has it existed?
- What is working well in the project?
- What is not working?

STEP 6:

Evaluation (10 minutes)

Briefly reflect together as a group on how well your first study circle meeting worked.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- How well did you manage time?
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

Before the next meeting, ask two people in your area to share their feelings about the community with you. Use the questions below, and write the answers in the space provided. You can ask the questions and write the answers in any language. There will be a brief report-back at the next meeting.

NOTE: Explain that you are taking part in a study circle and you have been asked to find out this information. Make it clear that this does NOT necessarily mean that the projects will be set up!

- What do you like about our community?

_____

_____

_____

_____

_____

_____

_____

- What problems in the community worry you the most?

_____

_____

_____

_____

_____

_____

_____

- What dreams do you have for our community?

_____

_____

_____

_____

_____

- What resources do we have to help achieve these dreams?

- What projects do you think could make a difference in our community, and help us to begin to achieve these dreams?

Meeting 2: Looking more closely at projects

STEP 1:

Report-back (30 minutes)

Start the meeting by reporting on some of the thoughts that people shared with you about your community. Use your notes on pages 5 to 6. To end off, briefly discuss the following questions.

Questions for discussion:

- Did people in the community find it easy to come up with project ideas? If yes, why do you think this was so? If no, why not?
- Which of the project ideas seem possible to you, and which do not?
- When people have ideas for projects, do you think they imagine getting involved themselves, or do they see projects as work for other people? Try to explain this.

STEP 2:

The project cycle (45 minutes)

Before we look at the steps in setting up and running a project, it is important to consider the 'project cycle'. Here are some questions to get started.

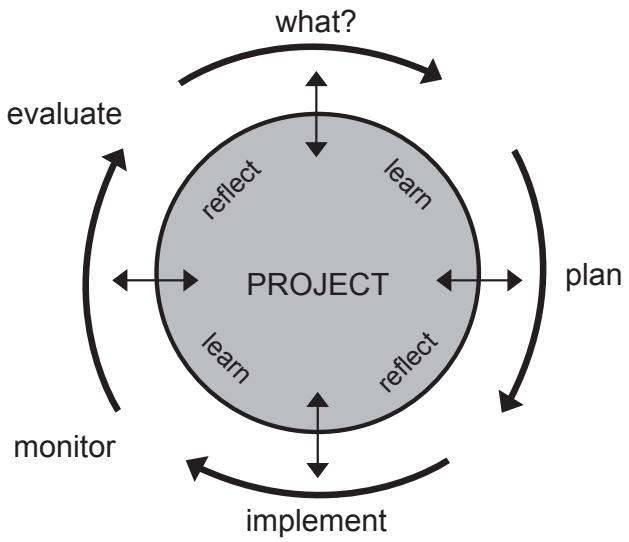
Questions for discussion:

- Has anyone ever heard of the *project cycle*?
- If so, what is it?
- If not, what do you *think* it is?

Now work with the person sitting next to you and look at the diagram of the 'project cycle' on the next page. Look at the different words ('plan', 'implement', 'monitor', etc.).

- ***What do you think each word means?***
- ***Why do you think the words 'reflect' and 'learn' are in the middle of the diagram?***

The Project Cycle



Adapted from *Handbook on Monitoring and Evaluation* by L. Clarke, CINDI Network, 2006.

After you have discussed the diagram in pairs, talk about it together as a group. Finally, read the short passage below.

It is very important to constantly monitor and evaluate what is going on at every step of the project cycle. If you do this, you will know exactly what is going on in the project, what you might need to change and how you can make it better.

A famous Brazilian educator called Paulo Freire said that it is important 'to name, to reflect critically and to act'. If you apply this to a project, you will constantly be naming what is wrong or right with the project; reflecting or thinking deeply and critically about it; and then acting or doing something about it.

STEP 3:

Setting up a project – where to start? (20 minutes)

Working on your own, look at the three following statements and put a mark in the box next to either AGREE or DISAGREE, depending on what you think:

- All projects start with some sort of need. ☐ AGREE ☐ DISAGREE
- The 'need' should be identified by the people who will benefit from the project (that is, by community members themselves). ☐ AGREE ☐ DISAGREE

- The word 'need' sounds like something is missing or wrong. A better word to use is 'asset'. This means that the community already has strengths and capacities to build on. ☐ AGREE ☐ DISAGREE

After you have responded to these three points, share your answers with each other and discuss why you agreed or disagreed with each of them. People are likely to have many different ideas.

STEP 4:

Setting up a project – Jabu's story (45 minutes)

Read the following story and then discuss the questions below as a group. You can read it silently to yourselves or one person can read it aloud.

Jabu is one of seven women who belonged to a sewing group. They used Jabu's lounge as their sewing room, but there was very little space as Jabu's two children also did their homework there. The women were very busy and made school uniforms for the local school, but they could not always keep up with the **demand** as they only had three **functioning** sewing machines. They did not make a lot of money as sometimes people could not pay or could only pay a small amount every month.

Then a literacy professor from a university in Johannesburg came to visit them and said that they should start Adult Basic Education and Training (ABET) classes. She said that she could help and told them that there was some money available for ABET projects.

Jabu and her friends got very excited about this. They had worked so hard on their sewing project, but did not make much money. The professor said they would each get a **stipend** every month. They were very happy about this because it meant that for the first time they would know how much money they would have every month, and they could buy enough food for their children and pay their school fees.

Jabu and her friends were trained as **facilitators**, which they enjoyed very much. Jabu found 20 learners easily, but some of the other facilitators did not. Some people in the community did not want to attend classes as they did not want to admit that they could not read or write. Some women could not attend classes as their husbands **refused** to let them. Jabu and the other facilitators wrote weekly reports to the professor who sent the reports to the funder overseas. They also filled in many forms.

Jabu and her friends ran the ABET classes for three months but then many learners started to drop out. Some said they were too old to learn, others said they were happy with what they had learnt and had learnt enough. Some said

they did not like to attend at night as they did not always have someone to look after their children. Others said they were afraid to walk at night. An **external evaluator** came to see how the project was getting on, and shortly after that the professor said to Jabu and her friends that the project had failed, and that the funder would no longer give them money.

Taken from *Learning in action! Monitoring and evaluating community-based projects*, CINDI, 2008 (unpublished).

Useful words you might not know

demand – a lot of people wanting something
external evaluator – someone who is not part of the project who checks to see how the project is working
facilitator – similar to a teacher
functioning – working
refused – would not allow / said no
stipend – a small salary / money to pay for basic costs (lunch, taxi, etc.)

Questions for discussion:

- Why do you think this project 'failed'?
- What does this tell us about the link between projects and 'need'?
- If you were Jabu, how would you have responded to the professor's suggestion to start an ABET project? Why?
- What does this story tell us about so-called 'experts'? Do you think there is a place for them? If you do, in what ways could they be helpful?
- Do you think there are 'experts' within a community or group like Jabu's? Explain.

Many projects fail because an outside 'expert' tells a group or community that they need something, or a funder has money and the group decides to use it. These projects usually fail because the real needs of the community are not properly identified. Also, the people who are supposed to benefit from the project are often not consulted or involved. When this happens, people feel that the project has been forced on them. A project cannot succeed if it is not built on a deep understanding of people's lives, interests, capacities and needs.

STEP 5:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- How well did you manage time?
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

When you go back home, try to find out about one project in your community that failed. Speak to people who were involved in the project. See if you can find out some of the reasons why it failed. Make some notes in the spaces below. There will be a brief report-back at the next meeting.

- What is the name of the failed project that you identified?

_____

_____

- Describe the goals of this project. What did it try to achieve?

_____

_____

_____

_____

- Did the project have some successes? What were they?

_____

_____

_____

_____

- Why did the project fail in the end? What do other people say about this? What do you think?

Meeting 3: What, why and who benefits?

STEP 1:

Report-back (30 minutes)

To begin the meeting, share the information you found about failed projects in your community. Use your notes on pages 11 to 12. When you have finished reporting, respond to the following questions to gather your ideas together.

Questions for discussion:

- Are there similar reasons why all these projects failed? What are the main causes of failure?
- What does this tell us about how to plan a project?

📖 Remember – you cannot run a successful project if there is no need for it. First, it is very important to identify the need or problem that the project will address. Think back to the discussion from the last meeting about involving community members in identifying a clear need. It is also important for them to help shape the way the project responds to this need. At the beginning of the 'project cycle' it is always necessary to do some research to find out what people think the project should look like.

STEP 2:

Whose need? (40 minutes)

Working in small groups of three or four, read the following story. Then answer the questions that follow.

📖 *Note*: Siyayadrift is not a real area, but it is based on a real one.

Mr Ngcobo from the municipality has called a meeting to inform community members that an overseas mining company is interested in starting a mine in the Siyayadrift area.

At the meeting, Mr Ngcobo makes the following points:

- The company has a black economic empowerment (BEE) partner, Nene Holdings, and they will involve the local community in whatever way they can;
- About 400 jobs will be created over the 20-year period that the mine will be active, with other jobs being created while the mine is being built.
- Development will happen in the area, as things like roads, electricity and water will be needed by the mine.

Mr Ngcobo then says that if the mine is to open, the residents of Siyayadrift will have to move to the other side of the railway line, as the mine will be built where their homes are at the moment.

Thuli raises her hand and says: Many of us have lived in this area for a long time. I live in my grandmother's house and she is buried not too far from the house. Where will I be buried if we are moved?

Mr Ngcobo: There will be a new burial site across the railway. Just think of all the opportunities this mine could bring to you!

Thuli: Eish! I don't know anything about mining. Is this fancy overseas mining company going to train us on mining?

Vusi: Good question, Sis Thuli! Mr Ngcobo, aren't you worried they may bring in 'skilled' miners from other areas?

Mr Ngcobo: No, no! This is about you, not them.

Zandile: Heibo! You mean them making profits off our land!

Bongani: No! WE could get rich.

Sibongile: I have heard that mining can destroy the land and make the water dirty and poisonous.

Nomsa: But we will all have jobs!

Vusi: How do you know? And you can only work as a miner for about 15 years. Many miners get very sick.

Nomsa: Heibo, Vusi! You don't have a job now. At least you would have a job!

And the debate continued…

Taken from *Training for Socio-Economic Transformation*, ESSET/PACSA/Fairshare, 2009 (unpublished). Used with permission.

Questions for discussion:

- Who do you think will benefit from the mining 'project' in Siyayadrift? Why do you say so?
- Why do you think the residents of Siyayadrift have such different opinions about having a mine in their area?
- What does the story of Siyayadrift tell you about understanding the interests of different stakeholders in a community?
- If you lived in Siyayadrift, would you say 'yes' or 'no' to the mining project? Why?

If time allows, read the following passage together and discuss it briefly. Let each study circle member say which definition of development they like best and why.

The term 'development' has many meanings. Here are three different ways that people have come to understand it.

1. *Economic development* – The dominant or main view of 'development' focuses on the economic growth of traditional societies, which are seen as economically and culturally backward. It is about changing societies from traditional ones into modern ones, with things like shopping malls, casinos and stadiums. The idea is that eventually the wealth in a country will 'trickle down' to everyone. In other words, if people make more money, they will spend more money, and gradually this will reach the poor. This idea of 'development' has not been very successful. Millions of people still live in poverty, as the wealth has not reached them. This dominant development **trend** only creates a lot of wealth for a few people.

2. *Liberation development* – In this **approach**, development is seen as a process of **liberating** the **oppressed** by a process of **conscientisation** – that is, helping the oppressed (and the **oppressor**, if possible) to become aware of the larger forces that shape the society they live in, and to act upon this situation in a way that will change it **radically**. It is a process of changing both the **fundamental** values and **structures** of the society.

   An example of liberation development is the work of Paulo Freire (see Meeting 2, page 8), who taught poor people literacy in the 1960s in the slums of Brazil. He believed that literacy was not just about 'reading the word', but also about 'reading the world'. He taught people literacy as a way of helping them to become critically aware of the conditions they were living in, and why. He wanted people to act to change their situation, and he saw literacy as a way of equipping them to do this.

3. *Development-as-empowerment* – This approach to development does not focus first and foremost on meeting people's 'need'. Instead, it **emphasises** the capacities more than the poverty of the poor. It focuses on people's ability to act, rather than their helplessness or their powerlessness.

Development **highlights** the **positives** in a community rather than dwelling only on the **negatives**. It emphasises *participation* in something **desirable** rather than *liberation* from something undesirable.

Many people involved in development think of poor people as having 'nothing' and outsiders then 'giving' them something or 'meeting their needs'. This approach is often very disempowering. It means that people become **dependent** on others to help them, rather than learning how to help themselves. It is more empowering to focus on the 'assets' in a community and to build on these. A community's assets can be very **diverse** and include things like history, traditions and institutions, as well as people's skills, talents and local knowledge. Building on these assets is a way of building a community's power to deal with people in positions of power.

'Development-as-empowerment' is similar to 'participatory development', where people in the community participate in thinking about, planning and implementing their own development goals. They have the power, control their own development and are not reliant on others.

Adapted from *Training for Socio-Economic Transformation*, ESSET/PACSA/Fairshare, 2009 (unpublished).

Useful words you might not know

approach – a way of doing something
conscientisation – developing a critical understanding of a situation, then thinking deeply about that reality and finally acting to change it
dependent – to rely on / the opposite of 'independent'
desirable – something you would like, that is good / nice
diverse – different / full of variety
emphasise – place importance on something / focus strongly
fundamental – basic
highlight – focus on / show
liberating – freeing
negatives – bad things / problems
positives – good things / strengths
radically – completely / fundamentally / extremely
structures – political and economic systems and institutions
the oppressed – people who are in positions of weakness and are kept in that position by people with more power
the oppressor – someone in power who uses his or her power in a negative way to keep people below them in a position of weakness
trend – popular way of doing things

STEP 3:

Focusing on the 'bigger picture' (40 minutes)

When trying to understand the problems in a community, it is always important to think about the 'bigger picture', and how it plays a part in all aspects of our lives, even if we are not aware of it. How do the problems in our community reflect patterns in the broader society? What are the bigger forces at play in the world that influence the way our society works?

We do not operate by ourselves, in isolation or in a vacuum. We need to be aware of what is going on around us and how this impacts on what we do. When planning and implementing a project, it is helpful to bear the 'bigger picture' in mind. It is impossible for one project to change powerful international trends on its own. Sometimes this can feel rather discouraging. But starting a project is about being strategic. It is about tackling a smaller aspect of a big problem in a way that can begin to make a real difference.

One of the main tasks of a project leader is to hold in tension 'the world as it is' and 'the world as it should be'. This means being realistic and idealistic at the same time. It means having a big vision to make meaningful change in the world. But it also means being able to work in very practical and strategic ways, building alliances with other projects in order to have a bigger impact. Understanding the 'bigger picture' helps us to begin to address the root causes of problems, rather than just the symptoms.

There are strong economic forces and ideologies that shape our lives today. We live in a *neo-liberal* world. Even if we are unaware of what this means, we are all affected by it.

After reading the passage above, take time to explain some of the modern world's main ideologies and trends to each other. Use the questions and points in the box on the next page to guide you.

Questions for discussion:

- Have you ever heard of the following ideologies and trends:
  - Capitalism?
  - Consumerism?
  - Globalisation?
  - Neo-liberalism?
- If so, what do these terms mean?
- Can you think of some ways that these big forces make themselves felt in our everyday lives?

To assist your discussion, think about some of these points:

- Textile and clothing factories in South Africa. What has happened to them? Why are there so many clothes made in China in our shops?
- Large overseas companies and their relationships with South African companies.
- Managers earning huge amounts of money while employees, like cleaners, barely earn a living wage.
- Bad conditions in *public* institutions like government schools and hospitals, while *private* schools and hospitals offer much better education and health care.
- Service delivery protests, where ordinary people say they do not have access to things the South African Constitution guarantees.
- The widening gap between the rich and poor.

If time allows, read the following passage for some more clarity, or read it when you get home.

Capitalism is the dominant **ideology** in the world. It results in deep divisions between rich and poor, and creates a **class-based** society. There are continuing conflicts and struggles amongst the different classes of society – the upper class, middle class and working class. Capitalism also causes the **exploitation of the environment** from where it draws its wealth.

Neo-liberalism is a form of capitalism that strongly promotes **privatisation**, free trade and **deregulation** in the push for economic development.

Consumerism is a culture that bases happiness and the good life on how much you have. This makes people focus on what they lack, and makes them want more and more. Advertisers feed this hunger. The consumer culture in today's society turns citizens into individuals defined by needs and wants. Their basic question is 'what can I get?' rather than 'what can I do?' or 'how can I contribute?'

You have probably heard of the term *globalisation*. People often say that we now live in a 'global village', which means that we are all connected to each other, no matter where we live. Globalisation has many forms – political, economic and cultural – some of which are more harmful than others. People, products and ideas travel more quickly and easily around the world than ever before. Bad decisions made on one side of the **globe** can have a negative impact on the other side. English is becoming the language of global communication. Local cultures are disappearing as an international 'Coca-Cola' culture starts to take over.

Neo-liberal globalisation is to do with economics and how money is **distributed** throughout the world. As we all know, some countries are rich and others, particularly in Africa, are poor. Since the world has become 'globalised', poor countries have been forced to open their borders and allow goods and services to **flow** freely in and out, without **tariffs** and price controls. This is called a *free market economy* and is part of neo-liberalism. As a result, rich companies from rich countries can do what they like in other countries, with very few **restrictions**. Governments have become less and less powerful and are told to 'let the markets rule'. In a system like this, more and more things are **privatised**, including basic rights such as water. Rights then get called 'services' and people have to pay for them. This system **favours** the rich and makes the poor poorer, even though **supporters** of neo-liberalism would disagree.

If you want more information about the issues mentioned above, look in your local library or on the internet.

Useful words you might not know

deregulation – limiting rules that protect weaker producers and consumers of goods
distributed – spread around (who gets and who does not)
exploitation of the environment – destroying / harming the natural world to create something for profit (like a mine, hotel or golf course)
favours – rewards / is on the side of
flow – move easily
globe – earth / world
have access – have the opportunity to enjoy or benefit from something
ideology – a world view / a way of structuring how society works
privatisation – limiting the government's role, and encouraging private ownership of public goods
privatised – belongs to individuals, not the government
restrictions – limits / rules / controls
supporters – followers / believers
tariffs – taxes on imported and exported goods

STEP 4:

The system in practice (30 minutes)

Read the following story about a group of poor, rural South Africans trying to make a living from farming and how the neo-liberal 'system' and the consumer culture make this very difficult, if not impossible.

The Trust for Community Outreach and Education (TCOE) and Cala University Students Association (CALUSA) recently studied 40 Land Redistribution for Agricultural Development (LRAD) projects in several districts of the Eastern Cape and Western Cape. The results of the study confirm what several other scholars and land rights activists have been arguing for the past ten years. This is that the **market-based** approach and the framework for **land redistribution** are at the centre of the problem. The research highlights the common issues on all the farms: instead of increasing their production they have lost most of their livestock; there is a lack of **capital**; lack of proper infrastructure, especially roads; a lack of farm management skills; a lack of proper governance structures; a lack of post-settlement support; and a lack of easy accessible information about government land programmes.

As Mama Fan from one of the farms says, 'We thought our lives would be a bit easier, but we struggle from morning to night'.

Rural poverty and under-development is **structural** and therefore the existing land redistribution programme will continue to have more failures than successes, even if the Department of Land Affairs increases its capacity and resources to deliver on its land targets of 30% by 2014. The programme will only be able to transform the countryside and give more poor people control and ownership of land if there are radical changes to the framework, the entire system of landholding, and the model of agriculture in South Africa.

Adapted from 'Use it or lose it. Land Minister gets tough on the poor', an article by Mercia Andrews in *Amandla* magazine, April/May 2009.

Useful words you might not know

capital – money
land redistribution – giving land back / ensuring fairer ownership of land, especially among the poor
market-based – the South African government has adopted a 'willing seller, willing buyer' approach to obtaining farms for redistribution. ***structural*** – related to the political and economic structures or systems in a country

After you have read the passage on pages 20 to 21, respond to the following questions as a group.

Questions for discussion:

- How can you see *neo-liberalism* at work in this story about land redistribution in South Africa?
- What do you think about the writer's suggestion that there needs to be 'radical changes to the framework, the entire system of landholding and the model of agriculture in South Africa'? How do you think this system can be improved?
- Can you see *consumer* attitudes in this story? Explain.
- How would the story be different if it focused on people's capacity to take action together to improve their situation?

STEP 5:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- How well did you manage time?
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

Before the next meeting, read a newspaper or a magazine, listen to the radio, or watch TV, and try to find *one* current example of neo-liberalism, globalisation, capitalism or consumerism in action.

For example, the doctors' strike of June/July 2009 was about poor salaries and poor working conditions in government hospitals. Government hospitals have suffered badly because of neo-liberal policies that push for basic services like health to be privatised.

Write your example on the lines below and briefly explain why you chose it.

Meeting 4: Establishing identity and purpose

STEP 1:

Report-back (30 minutes)

To begin the meeting, share your examples of how big forces like capitalism, consumerism, globalisation and neo-liberalism affect everyone. Refer to your notes on page 22. Then use the following questions to wrap up your reports.

Questions for discussion:

- Has the discussion about the 'bigger picture' helped you to understand better how our society works?
- How do you feel after spending time thinking about capitalism, consumerism, globalisation and neo-liberalism?
- If you feel discouraged or powerless, how can this study circle help you to feel more hopeful?
- If you feel empowered to act, what ideas do you have about what to do?

STEP 2:

Creating a group identity (40 minutes)

Now that we have spoken about the 'bigger picture' we can look at starting and running a project in more detail. As we go through the steps it is important to always keep the 'bigger picture' in mind.

In Meeting 2 we spoke about the project cycle and the importance of the need coming from the community members or group. Now we are going to look at everything to do with the planning of a project.

First you must begin with WHO you are and what you stand for. A community project is not something that you can plan or implement alone. If you are organising people in your community to take action on something, start by giving yourselves a NAME. Then you can identify yourselves as a group. It is hard to be a group without a name, even if it is a fairly loose kind of group.

It is possible to organise people in a community without creating a formal organisation. In fact, organising often involves building relationships and working with people across different organisations. But as you organise people, they need to be able to align themselves with a group that has a clear identity and sense of purpose.

There are many different ways of naming or identifying an action group. Some names focus on a theme or issue. Other names also capture the kind of group that is at work. Here are some examples:

- Food for All in Laladorp
- Parks for the People
- Development Action Now
- Hometown Clean-Up Initiative
- Red Bay Safe Water Campaign
- Community Safety Coalition
- Stadigstad Public Transport Alliance
- Local History Action Group

After reading the passage above, talk about it together in the group using these questions to guide you. Be creative and help each other think about names.

Questions for discussion:

- Are you thinking together with a group of people about starting a project? If so, does your group have a name?
- If the group does not yet have a name, what are some ideas?
- If you are not in a group, but you have an idea for a project, what do you think you could call your group when it is formed?

Use the space below to write some ideas of names for your group.

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STEP 3:

Vision, mission and strategic objectives (1 hour and 10 minutes)

It is very important to know what it is your group is trying to change. Everyone involved must know and understand what they are working towards and if they are making a difference.

Most organisations have a mission statement or a vision statement. Some organisations have both. If you are working with a looser group of people to start a project, rather than an established organisation, it is just as important to have a clear vision.

A project is not just about *doing* meaningful things. It is about *changing* a situation or *solving* a problem. This might seem strange, but many people get caught up in activities without really thinking about the purpose of their work. Organisations often land up doing things just because they've done them before, or because other people are doing similar work. It is actually very easy to get carried away by *activities*, and to forget that projects are about strategic *action* for change.

Before you start planning a project, first take time to clarify the vision, mission and strategic objectives that motivate your group. There are some guidelines below. On page 63 you will find some notes on how to register an organisation, if that is something you decide to do.

Here is an example of how an imaginary literacy organisation called Reading Power presents its work to the world. Divide into pairs and read the section that follows together. Then try to explain to each other what makes the vision statement, the mission statement and the strategic objectives different from each other, using the questions as a guide.

READING POWER – Extract from information brochure

Vision statement

Power for the powerless through reading

Mission statement

Reading Power promotes reading as a path to worker empowerment in South Africa

Strategic objectives

The strategic objectives of Reading Power are to ensure that:

- Miners and farm workers discover the power and joy of reading;
- Employers recognise the value of literacy among workers and provide literacy training;

- The government provides ongoing motivation and support for literacy work on mines and farms.

Questions for discussion:

- Why do you think the vision statement is so big and bold?
- How does the organisation's mission statement differ from its vision statement?
- What do the strategic objectives tell you about Reading Power as an organisation?
- Can Reading Power achieve its vision on its own? What other kinds of groups and organisations could also contribute towards this?

Still in pairs, now read through the following set of terms and their meanings. It can be quite tricky to understand the differences between them, so take your time and try to explain these ideas to each other in your own words. Keep referring back to Reading Power as an example.

Vision	**What the world (or country or your local situation) will look like if your group's hopes come true.**
	An effective vision statement is: • Very short; • Ambitious; • Idealistic; • Inspiring. It describes the situation that would exist if everything your group or organisation is working for happened. It says what would count as *complete* success for your group or organisation. The vision is not what a group thinks it will achieve this year or next year, but what things will look like eventually, if it achieves all its aims. It is often something that needs the work of many other organisations and groups in order to happen.

Mission	**Summary of why a group or organisation exists and the overall difference it wants to make.**
	An effective mission statement captures: • What you do; • Why; • Where; • For whose benefit. A mission statement must be short – no more than one or two sentences. It provides a clear, punchy statement of purpose. It is more specific than a vision statement, but still broad and long-term. It is not necessary for a group to have a vision statement *and* a mission statement. A strong mission statement is more important than a vision statement.
Strategic objectives	**Particular changes the group or organisation plans to bring about in order to achieve its mission and vision.**
	To achieve a big mission, it is usually necessary to approach the work from a number of different angles. One organisation cannot do everything. Its strategic objectives identify the particular aspects of an issue that it plans to address. Good strategic objectives must: • Be specific, but also visionary; • Respond to the *context* in which the work is happening; • Clarify the *choices* an organisation has made to advance its mission; • State what will be *different* when that particular aspect of its work has succeeded. Strategic objectives can take a long time to achieve. They may also change over time, as the context in which a group or organisation is working changes. Sometimes a *project* only addresses *one* of an organisation's strategic objectives. Additional projects are then designed to achieve other the objectives.

As a group, discuss and write a vision statement and a mission statement for a group called Walk Safe. Imagine that they are working in the city of Port Veronica to stop pedestrians from being killed by cars. Use the space below to write your ideas. If you come up with more than one statement, write them all down and discuss which ones are stronger and why.

Vision statement

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Mission statement

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STEP 4:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

Before the next meeting, ask someone who is involved in an organisation if you can share their organisation's vision and mission statements with members of this study circle. If you are involved in an organisation, you can share that organisation's statements. If you find a group that does not have a vision or mission, you can offer to help with the writing of these statements.

Use the space below to write the statements.

Vision statement

Mission statement

Meeting 5: Mobilising resources

STEP 1:

Report-back (20 minutes)

To begin, let a few members share the vision and mission statements that they found during the week. Read them out aloud, and then work as a group to see if the statements 'fit' the descriptions of the 'terms' (see pages 26 to 27). Use the following questions as a guide when you discuss each of the statements.

Questions for discussion:

- Is the vision statement big and inspiring? If necessary, how could it be improved?
- Is the mission statement clear and punchy? If necessary, how could it be improved?

STEP 2:

Ma Vilakazi's story (20 minutes)

Read the following story. You can read it silently to yourselves or one person can read it aloud.

Ma Vilakazi wanted to run a soup kitchen as there are many unemployed and hungry people, especially children, in her area. A nearby church in a richer area agreed to **donate** food for one year. The pastor said that they were happy to donate food as long as Ma Vilakazi found a kitchen in her area. The pastor of one of the churches in her area said that Ma Vilakazi could use their church's kitchen for three months. After three months, they would not be able to use it because the kitchen was going to be **renovated**, as it was a very old building. Ma Vilakazi started the project and thought that she would be able to find another kitchen easily, but she could not find one. She now only has two more weeks left before the three months is up. The pastor from the church that donated the food said that if there was nowhere to cook and serve the food, they would not be able to donate it anymore. Ma Vilakazi is very worried that the soup kitchen will not be able to go on.

Taken from CINDI's *Learning in action! Monitoring and evaluating community-based projects*, 2008.

Useful words you might not know

donate – give for free
renovated – make it like it is new again / fix
resources – money and assets (for example, a building, furniture, gardening tools, a car)

After reading Ma Vilakazi's story, discuss these questions as a whole study circle.

Questions for discussion:

- What did Ma Vilakazi do wrong in planning her project?
- What would you have done differently?

STEP 3:

Finding funding (30 minutes)

In the example of Ma Vilakazi, we saw how a project failed because of bad planning to do with resources. Think of some reasons why it is difficult for people involved in community projects to get resources for their work, especially funding. Write the reasons in the space below. Afterwards, compare your list with the points in the passage that follows.

It is often very difficult for people involved in projects to access resources, especially funding. This is now made worse by the global economic crisis. Here are some reasons why community groups struggle to get financial support for the projects they plan to do.

- Lack of information;
- Difficulties in identifying funders;
- Lack of capacity, especially for writing funding proposals;
- The project's requirements don't match the funders' requirements;
- Many funders have very strict rules for what project proposals should look like;
- Administrative procedures at funding agencies are long and difficult;
- The process of writing and submitting funding applications is difficult;
- It is difficult to get advice from donors on how to improve a proposal;
- Funding comes with conditions (for example, what can be funded, or how long the funding can last);
- Funders have their own priorities and are not interested in all kinds of projects;
- Delays in receiving the funding after it has been approved.

Now think of ways that you can overcome these difficulties. Discuss concrete ideas for what you can do to deal with some of the problems that you listed on page 31. Write down your thoughts.

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STEP 4:

Identifying other resources (30 minutes)

The case study that follows is true. Read it together, and then respond to the questions afterwards.

Mountain View is a section of Mabopane township outside Pretoria. Residents of Mountain View decided to take action when crime started getting out of control in their area. First, a group of neighbours got together to discuss the problem. They formed an organising committee. One of them, Mpho Adams, worked for an organisation that had a lot of experience in community organising and community safety issues. He agreed to become the chairperson. Then they held a bigger meeting for people from all homes in the area. Everyone agreed that something had to be done. They decided to form the Mountain View Neighbourhood Watch. Many people volunteered on the spot to be part of daily foot patrols. The organising committee built a relationship with the local police station and got their support. Police cars patrolling in the area began to stay in close contact with the foot patrols. Local businesses also became interested. The Neighbourhood Watch offered to keep an eye on their properties. In return, the businesses paid for cellphones and contracts to be used by the patrollers. When the Neighbourhood Watch decided to organise a march to get more young people involved in their work, the drum majorettes from a local school were out in front. People made their own banners. The organisers got permission from the municipality to hold a music festival in the local park at the end of the march. They also asked South African Breweries to provide a stage, and they agreed. Local musicians were happy to perform. After this day of partying, many young people signed up to be part of the Mountain View Neighbourhood Watch. Up until now, their efforts have been very successful and crime has gone down a lot in the area.

Questions for discussion:

- According to the story, how much funding did the Mountain View Neighbourhood watch manage to raise for their work?
- Are you surprised how much they were able to do? Why?
- What resources were they able to bring together to help make the project succeed? Make a list below and compare your ideas.
- What did you learn from this story about how to identify different resources for a project?

Use this space to write all the different resources (people, skills, experience, equipment, relationships and so on) that you can find in the Mountain View story.

STEP 5:

Roles and responsibilities (40 minutes)

Go back to the list of project ideas that you wrote on page 6. Divide into two groups, and let each group choose ONE of the project ideas. Write your project on the line below.

Pretend that you are part of a group that is involved in this project. Start identifying the resources in your team. Also think about other resource people in the community. Follow the steps below.

1. What jobs must people do to make the project happen? Think about the different roles your project needs (for example, chairperson, fundraisers, trainers, etc.). Make a list.

2 Decide who will be responsible for what and why. Think about the different kinds of knowledge and skills that you REALLY have in your group and how each person's knowledge and skills can contribute to the project. Find a useful role for every member of the group to play, building on his or her skills.

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3. Think about leadership. How are you going to address this?

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4. Decide if anyone needs training and suggest ideas for how you could go about getting it.

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Finally, get back together as a whole study circle and reflect on this exercise, using these questions to guide you.

Questions for discussion:

- What did you learn when discussing roles and responsibilities?
- What was easy?
- What was difficult?

STEP 6:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

During the coming week, think about resources you need for the project you are already involved in, or for a project that you would like to start. Then make a list of real resources in your community that you can try to access in order to make your project a success.

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Meeting 6: Writing a project proposal

STEP 1:

Report-back (30 minutes)

Begin by sharing some of the resources in the community that you identified that can help you with your project. Use your notes on page 36. Respond to these questions to wrap up the reports.

Questions for discussion:

- How do you feel after identifying resources in your community that can help you?
- If you did not identify any resources, why was this difficult for you?
- Does it help to focus on resources and assets in your community, rather than on what is lacking? Why do you say so?

STEP 2:

Writing project objectives (40 minutes)

In order to get funding for a project, it is necessary to write a detailed proposal. Writing project proposals is very hard work. It takes a lot of effort to state the purpose of the project clearly, and in a way that people will believe in the importance of what you want to do. Sometimes you might feel that you just have to write a proposal to satisfy a funder. But it is very useful to clarify the real purpose of the project for yourself and your project team. If you cannot state clearly *why* you are doing something, then is easy to lose your direction or to do things that do not have much impact.

The most important thing when preparing a proposal is to write clear project objectives. Once you can state what it is that you are aiming to *change*, then you can plan the right activities that will enable you to achieve these goals. Very often, people start with ideas for activities and then write the objectives afterwards. But this is the wrong way around! ALWAYS start with the objectives, no matter how difficult it is to do this. Then your project is more likely to make a difference.

Good project objectives must be SMART.

S = Specific	Clear and concrete.
M = Measurable	Possible to **prove** what has been achieved, and measure how well.
A = Achievable	Realistic, doable, not too ambitious, possible to put into action.
R = Relevant	Useful, strategic, sensitive to the context in which the project will happen.
T = Time-bound	Provide time goals.

Here are some examples of SMART project objectives:

- To help ensure that a new policy on improving the teaching of reading in South African schools is adopted by the Department of Education within three years.
- To establish adult literacy programmes in all farm schools in the Free State by the end of 2015.
- Over a period of 18 months, to motivate and equip parents in five townships around Johannesburg to read to their children.

In pairs, look at the following project objectives and check if they are SMART. If they are not, identify what is missing and rewrite them on the lines below.

To help our learners to read, we will:

1. Provide one-to-one literacy support.
2. Work with prisons to identify people with reading difficulties.
3. Provide more reading materials to adults who are learning to read.

Objective 1:

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Objective 2:

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Objective 3:

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STEP 3:

Objectives, activities and outputs (40 minutes)

One of the trickiest things when writing a project proposal is trying to understand the terms that different funders use, and how they use them. Often one funder uses a word in one way, and another funder uses it differently. This can be very frustrating, but it helps to understand that funders usually want you to provide different **levels of objectives**, **starting broadly and becoming more specific**, followed by **activities and/or outputs**. If you understand this principle, then it is easier to figure out how they use the various terms, and how to use them in your proposal.

Overall aim	The big change the project aims to achieve. It must be within the reach of the project – not too grand or ambitious. This is the same as the *overarching goal*.
Project objectives	SMART statements saying what will be different when the project ends. Sometimes the words *outcomes*, *results* or *specific aims* are also used.
Activities	The things you will DO to achieve the objectives (like training, research, building or distributing seeds). Sometimes activities are called *inputs*.
Outputs	Products, services or facilities that will result from the activities.Sometimes the word *deliverables* is also used.

Remember the group called Walk Safe (see page 28) that is working to prevent the deaths of pedestrians (walkers) in the city of Port Veronica. Here is an example of how they might present some of their work in a project proposal. Look carefully at the aim, objectives, activities and outputs. Explain how each 'level' is different. Show how they fit in with the notes on page 39.

Overall aim	Cut pedestrian deaths by half in Port Veronica in the next three years.
Objectives by the end of the project	1. Road safety is taught in all local schools. 2. Zero-tolerance for jaywalking (not crossing roads at robots). 3. Speed limit cut to 30km an hour in busy pedestrian areas. 4. Drunk pedestrians do not walk alone.
Activities falling under Objective 1	1a Write and publish teaching materials on road safety. 1b Train and support teachers to use road safety materials. 1c Run road safety poster competition in schools.
Outputs from these activities	• Road safety booklets for Grades 2, 6 and 11. • Lessons plans on road safety for teachers. • Ten workshops for teachers, each involving three schools. • Report-back conference for teachers to share experiences. • Exhibition of prize-winning posters at City Hall. • 20 billboards featuring three winning poster designs. • 600 posters for lamp poles

Note: The proposal would also need to list the activities falling under the other three objectives, and the outputs from all these activities. This is just a brief example.

Now try to write your own objectives. Divide into two groups. Imagine that you are members of a community action group in your town or city called Parks for the People. You are starting a project to develop new parks. Using the model above, write the overall aim, project objectives, some examples of project activities and some examples of project outputs.

Overall aim

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Project objectives

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Examples of activities under one of the objectives

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Examples of outputs from these activities

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STEP 4:

Writing a project proposal (30 minutes)

If time allows, read the notes below and explain them to each other as you go along.

There are a number of different agencies that make funding available to groups and organisations involved in development and community building. It is a good idea to ask people you know who may have worked with funders if they can help you with names and contact details, although sometimes people can be quite unwilling to share this information!

Here are some examples of funding agencies:

- **SA government agencies:** Especially through the National Development Agency. Some government departments (e.g. Health) also support community initiatives. Municipalities sometimes also have resources to share.

- **Foreign donor agencies:** For example, USAID, DFID and AusAID. These agencies can be contacted via the countries' embassies.
- **Foundations:** For example, the Ford Foundation and the Bertelsmann Foundation. Some have offices in South Africa. Others must be contacted overseas.
- **Corporate funders:** Big companies (like Anglo American) often have 'social responsibility programmes' to support community work.
- **Church associations:** There are some large international development associations connected to churches, like Norwegian Church Aid.

When writing a project proposal, there are some important things to remember:

- It is a good idea if everyone involved in the project can contribute to the writing of the proposal in some way. This can include brainstorming, planning or writing. This helps to build people's commitment to the project and a sense of shared **ownership**.
- Think about who will actually read the proposal, and what their interests are. Not all funders support all kinds of work. Get information about their **priorities**.

  Two kinds of people are likely to read it:

  a) The project officers at the funding agency. Sometimes there may be more than one decision-maker, for example, a committee.

  b) An expert in your field of work who will focus on the **technical** parts of the proposal, and then tell the funder what she thinks of your plans.
- Funders usually have their own **formats** for writing proposals. Be sure to get instructions from them before you start writing. Here are some of the main items that you are usually expected to include in a proposal. The order might differ and some other items might be added. Some funders like you start with a short 'concept proposal', which is followed by a longer, more detailed funding proposal after they have expressed interest in your idea.

Title page

This should include the following: name of the project; name of your organisation (include a **logo**, if you have one); contact person; project **duration**; name of the funder that you are submitting the proposal to; and the date of submission.

Executive summary

This should give a very brief overview of the project rationale, objectives and main activities. It can be as short as one paragraph, and not more than one page.

Introduction and rationale

Describe the situation in which the project will be rolled out, and the particular problems or issues it is responding to. Provide strong arguments to justify why this kind of action is needed. Include research **statistics** or **findings** about the issues to support your arguments.

Organisational background

Include a description of your group or organisation and how your work experience enables you to address the issues successfully.

Overall aim

See earlier explanation on page 39. This is the big goal.

Project objectives

See earlier explanation on page 39. Remember, they must be SMART.

Activities

See earlier explanation on page 39. Describe the activities that fall under each project objective.

Outputs

See earlier explanation on page 39. List the outputs that will result from each activity.

Target groups

Describe the focus population, the people who will benefit from the project and the groups that will be involved.

Workplan

Provide a broad plan of when the activities will take place. It is not always necessary to give exact dates, but you should indicate in which month(s) the work is planned to happen. It is useful to draw up a calendar.

Monitoring and evaluation

Say who will be responsible for monitoring and evaluating the implementation of the project and how this will be done. Also say how you will know if the project is successful or not. Provide concrete ways of proving that the project was properly and successfully implemented. These are called **indicators**.

Key personnel

Say who will work on the project (managers, administrators, trainers, field workers, researchers, evaluators, financial officers, etc.). Explain if volunteers will play an important role.

Strengths and innovations

Highlight the project's strengths and any aspects of your project that are innovative or original (in other words, the things that make your project different so that it stands out from others).

Sustainability

Describe some of the **strategies** you will use to keep the project going once the funding ends. Include ways that you will try to generate local income or find other partners or funders.

Budget

Include a **summary** budget in the form of a table. Also include separate budget notes describing how you calculated the budget amounts that appear in the table. Say broadly how you will spend the amount for each item (travel, catering, etc.).

Organisational status

Funders usually require that groups or organisations applying for funding have an NPO registration number and a constitution (a document that states who the organisation is; what its principles, systems and values are; who makes up the organisation; and what it does). See page 63 for more information on how to register an organisation. You might also need to provide proof that you have a good enough accounting system to manage the money and report on your spending. If your group is new and small, it is possible to ask a bigger organisation to be the **fiscal agency** for you, and manage the funding on your behalf.

Adapted from CINDI notes (2009); CIVICUS: *Writing a funding proposa*l – www.civicus.org; IPPF: *Guide for designing results-oriented projects and writing successful proposals* – www.ippfwhr.org.

Useful words you might not know

duration – the time something lasts / how long something goes on for

findings – what you or others have found out / facts discovered by working in the field

fiscal agency – organisation that manages your funding through its own financial systems

format – way of presenting the proposal (types of headings, charts, number of pages, etc.)

indicators – signs of success / ways of measuring impact

key – main / important

logo – a small picture or symbol that represents an organisation (used on posters, brochures, etc.)

ownership – feeling part of something / feeling that something belongs to you

priorities – issues and areas they have chosen to focus on

rationale – justification / explanation

statistics – numbers / percentages

strategies – methods / approaches

summary – very brief / short / not detailed

technical – needing particular knowledge and skills in that type of work

STEP 5:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

As a project is rolled out, it is important to do what you say you are going to do in the proposal. Think about how you can keep track of what is happening once you start putting project plans into action.

What are ways to make sure that all the people involved in the project are doing what they are supposed to be doing?

How can you make sure that activities happen according to plan, and within the budget (in other words, no overspending)?

What can you do to keep good project records?

Meeting 7: Monitoring and evaluation

STEP 1:

Defining monitoring and evaluation (15 minutes)

This meeting begins a bit differently. The report-backs will happen in Step 3. First take time to understand the meaning of monitoring and evaluation.

Project **monitoring** is what you do throughout the life of the project to make sure that things are happening properly. It includes keeping track of activities in quite a detailed way to ensure that they take place according to plan. It also means keeping a close eye on how much is spent for each activity, and making sure that spending does not go over the budget. Depending on the type of project you are running, monitoring involves keeping good records of dates, numbers, people and places. For example, how many workshops are held, and when, and how many people attend? Or how many food gardens are started, and where, and how many gardeners are involved? This information must be studied and discussed in an *ongoing* way so that the project plans can be adjusted if necessary.

Project **evaluation** happens *occasionally* during the life of a project (depending on how long it is), and always at its *end*. It is about analysing more deeply what is working well in a project and what isn't, and learning from it. During the evaluation process, you will take a closer look at all the monitoring information, while also looking at the broader context in which the project is being implemented. Evaluation tries to measure whether the project is making a difference in the lives of the main target groups, as well as in the broader community. The evaluation asks to what extent the project objectives have been achieved.

People often refer to monitoring and evaluation as M&E.

After reading the notes above, explain them to each other in your own words.

STEP 2:

Why is monitoring important? (30 minutes)

Divide into four small groups, and let each group discuss one of the questions below this. Write your ideas in the space provided. Take about 10 minutes to discuss your question. If you finish before the other groups, then start discussing some of the other questions.

1. Why is project monitoring important for the leaders of a project?

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2. Why is monitoring important for the people involved in implementing a project (staff and volunteers)?

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3. Why is monitoring important for the funders supporting the project?

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4. Why is monitoring important for the community where the project is being implemented?

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After 10 minutes, get together again as a whole study circle, and let each small group report on their answers. Then have some open discussion before moving on to Step 3.

STEP 3:

Setting up a monitoring system (45 minutes)

Now take time to report on the ideas you had during the week for making sure everyone is doing what they should be doing in a project. Use your notes on page 46.

After reporting, pretend that you are a group of people who are about to start implementing a new project. You are meeting to set up a system for monitoring the project. List some of the things that you should think about together during this important discussion.

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After writing your thoughts, compare your list with the following:

- What does the monitoring system hope to do?
- Which project activities will we look at?
- What kind of information will show us if the activities are working well?
- How will we find out if there are problems with the activities?
- How will we get the information?
- When will we collect the information?
- How will we record the information?
- How and when will we analyse the information we have collected?
- How will we present what we have learnt?
- How will we use the information to make our project work better?

It is best if the people who are involved in the project decide together what they should be looking for while monitoring. This is called *participatory monitoring* and it means that everyone who is involved in the project designs the monitoring system, collects the information, analyses the information and decides how it will be used to make the project better. Plans for monitoring should form part of the planning stage of the project.

STEP 4:

Project evaluation (30 minutes)

Still pretend that you are all part of a group that is implementing a project. Imagine that a whole year has passed, and that you are now going to be joined by two experts from Germany. They have been asked to evaluate the project on behalf of the German funder that has been supporting the project. Divide into pairs and discuss the following questions.

Questions for discussion:

- As you wait for the German evaluators to arrive, how do you feel? Why do you feel like this?
- Do you think it is right for people to come all the way from Germany to evaluate your project? Why do you say so?
- What would help to make the evaluation process comfortable and useful for you?

Evaluation can be a scary word. Most people are afraid of failure and don't like to be judged by others. Often this means that when a project is evaluated, people try to paint the best picture possible. It can be difficult for us to be honest about mistakes and failures, but we can learn very important lessons from them. And of course we learn from successes too. Evaluation is about learning to deepen the impact of our work, and being accountable to our partners and communities.

There are many different approaches to project evaluation. First it is important to decide what the evaluation is for. Then it is easier to plan how it should happen.

Internal evaluation

It is useful for a project team to hold its own internal evaluation every few months. This means that everyone can learn from what is happening. If the project is running into trouble, it is very important to try to understand why things are going wrong. Then changes can be made before it is too late. These changes MUST be negotiated with the funder. It is not possible to change or delay project activities without keeping the funder informed and explaining the reasons.

External evaluation

Most funders like to do an external evaluation at the end of a project, although sometimes this can also happen halfway through a long project. This means bringing in experts from South Africa, or from another country, or both. Their role is to give an 'outsider's' opinion of how the project has worked. The external evaluators are supposed to work with the project team to design the evaluation process.

Participatory evaluation

Just as there is participatory monitoring, so there is participatory evaluation. Here the aim is to involve people from across the community in evaluating the project, not just experts. It can be very empowering for the people who are supposed to benefit from a project to be actively involved in evaluating it. This means they can be involved in gathering information, sharing their thoughts about what works and what doesn't, and reporting back to others in the community.

If time allows, discuss some of the points about evaluation and share what approaches you think would work best for you.

STEP 5:

Report-writing (10 minutes)

Before wrapping up the meeting, take a quick look at the notes below.

If you get money from a funder, they will need you to send them reports on the progress of your project. There are many different ways to write a report and funders often have specific requirements.

Here are some things that can go into a progress report:

- What are the project's objectives?
- Are the objectives being met?
- If so, what are you doing to achieve the objectives (what are the main activities)?
- What evidence do you have that these activities are happening (registers, reports, checklists, etc.)?
- When were the activities done?
- Have any of the objectives *not* been met? If so, why? What are you doing about this?
- Describe all the good things about your project – what is working well?

- Describe all the difficult things about your project – what is not working well? What are you doing about this?
- Who is benefitting from the project? In what ways?

The information you gather during project monitoring will be useful when you prepare your reports for the funder. Funders often ask about the *impact* of a project, that is, the broader effect of a project on the community, or at higher levels such as government policy. The impact questions are usually tackled in evaluation reports.

STEP 6:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

For next time, think about and write down what you think makes a project SUCCESSFUL. Also speak to some friends and neighbours to find out what they think.

Meeting 8: Sustainability and success

STEP 1:

Report-back (20 minutes)

As a group, report on your thoughts about what makes a project successful. Refer to your notes on page 52.

After sharing your ideas about successful projects, read the passage below and discuss the main points.

📖 There are many things that can make a project successful. When evaluating success, here are some important questions to ask:

- Has the project met its objectives?
- Has the project made a positive change?
- Is the project sustainable? In other words, can the work continue after the project ends? Are the results deep and long-lasting?
- Has the project made an impact on the larger community?
- Has the project given people more hope, energy and power?

STEP 2:

Two project stories (50 minutes)

Here are two stories of community projects – Latita in Port Elizabeth and Vukani in Hammanskraal. Divide the study circle into two groups. Let one group read the first story, and the other group read the second one. Answer the questions that follow in your small groups. Then come together after 50 minutes to share what you have learned, and to wrap up the discussion about sustainability.

📖 **Story 1: Latita Community Soap Project**

The **age-old tradition** of making homemade soap has become a **lifeline** for 16 families living in Kwadwesi and Joe Slovo townships. The Latita Community Soap Project helps unemployed people make money by producing glycerine-based, handmade soaps using ingredients such as tea tree oil and

rooibos. The development project was **established** by the Calabash Trust, a non-profit charity organisation based in Port Elizabeth, to help unemployed parents to pay school fees and for daily necessities. There are currently two groups of eight people working from Emafini Primary School and Joe Slovo Primary School, respectively. They are all parents who have been identified by the school governing bodies of the two schools as people in need of **social upliftment**.

'Poverty is a big problem in the area and there is a great need to empower people to become **self-sufficient**,' says Calabash Trust's Carla Collins.

Apart from learning how to make soap, group members have received training in courses such as ethics, finance and **budgeting**, as well as **professionalism**. According to Carla, this is important because most of the members were unable to complete their education due to financial and social **constraints**, making finding employment difficult.

One of the women involved with the project, Nobuhle Plaatjie, 41, grew up with her grandparents and was forced to leave school early when her grandparents died, leaving her without the needed skills to join the workforce. Her husband does not have a permanent job and they have been **struggling to make ends meet**. 'Latita means a lot to me, I can finally put something on the table for my family,' she said.

Another woman involved in the project is Julia Mayinje, 42, who after being **abandoned** was adopted by an aunt who refused to send her to school. She, like the other women and one man involved in Latita, says she has gained **invaluable** knowledge through the project and hopes it grows.

The Summerstrand Hotel has started making this dream become a reality by becoming the project's first customer. Their soap is used in all the guest bathrooms and also as **corporate** gifts. According to the Summerstrand Hotel's Nicolette Saayman, they have also helped the groups with **mentoring** in **marketing**, **sales**, **product development** and other business aspects of the programme.

Nkosinathi Kani, another woman involved in the project, says the group members hope to earn enough money to donate funds to the schools which have become their place of business.

Taken from *The Herald* newspaper, 8 July 2009. Written by Eleanor Douglas-Meyers.

Useful words you might not know

abandoned – rejected / left on own by parents
age-old tradition – old ways of doing something / passing of knowledge or skill from one generation to the next
budgeting – working out the amount of money needed
constraints – restrictions / limits / barriers / obstacles
corporate – business / company
established – started / set-up
ethics – morals / what is right and good
invaluable – very valuable / very important
lifeline – rescuer / saviour
marketing – advertising / telling people about your product
mentoring – giving advice and guidance to someone / a kind of teaching
product development – ideas for new products and ways to present them
professionalism – keeping to high standards when you work
sales – selling
self-sufficient – needing no help from others
social upliftment – helping to improve their lives
struggling to make ends meet – finding it difficult to pay for everything you need

After reading the story about the Latita project, use these questions to guide your discussion. There are some answers in the reading, but also give your own ideas.

Questions for discussion:

- Do you think Latita is a successful project? Give reasons for your answer.
- Is there something in this story that inspires you or gives you hope? Why do you say so?
- What things are mentioned in the reading that can help to make the Latita soap project sustainable?
- Do you think the Latita project could face any risks or dangers in the future? Explain.
- What ideas do you have to overcome these risks and make Latita more sustainable?

Story 2: Vukani Community Development Organisation

Vukani Community Development Organisation was established in 2004 by Nomthandazo Skhosana and a group of young women in New Eersterus, a section of Hammanskraal north of Pretoria. Nomthandazo (known as Nomthi) said, 'I got a group of people together and explained what I wanted to do. I needed to know if I had support. And people did support me. Before long, we drew up a constitution, elected office bearers and applied for registration.'

She and her team decided to set up an after-school programme that caters for over 70 children every day. They receive lunch, help with schoolwork, and also participate in sports and cultural activities. Vukani works closely with the social services and health departments in Moretele. Nomthi explained, 'Because of AIDS there are deaths every day in the area. Children are not being taken care of properly. Many of them stay alone or live with elderly relatives, who cannot always cope.'

Nomthi spent a lot of time developing the leadership capacity of her young helpers in Vukani. In the beginning, she always made sure that at least one person went with her to every meeting, so that they could learn how to talk about the work they were doing. After a while, the younger leaders started to attend meetings alone. Vukani went from strength to strength because Nomthi used all the resources available to her. 'Most of the time when community organisations think about resources, they think about money,' says Nomthi. 'In the beginning we achieved a lot with no money whatsoever.'

For Nomthi, relationships were one of the most important resources of all. 'I used to listen to what people said and I always followed up. If they said "I'm only a phone call away", they would hear from me often! My approach was to keep on opening doors,' explains Nomthi.

At first, the Vukani team used to meet in Nomthi's mother's home. Then they started to work out of someone else's garage. Nomthi and her colleagues went from door to door asking people in the area if they had suitable space for the after-school programme. They never gave up. Eventually a man in the community responded to their vision and Vukani set up its after-school programme in a hall that he had built.

After three years of working without any money, Vukani began to receive some funding from the Department of Social Development in the Tshwane Municipality. Sadly, Nomthi passed away in January 2010. But the other young leaders at Vukani were determined to continue the work that she had started, and were confident that they could do so.

Adapted from *Taking the Lead – Ordinary People, Extraordinary Stories*, Idasa, 2005.

After reading the story about the Vukani project, use these questions to guide your discussion. There are some answers in the reading, but also give your own ideas.

Questions for discussion:

- Do you think Vukani is a successful project? Give reasons for your answer.
- Is there something in this story that inspires you or gives you hope? Why do you say so?
- What things are mentioned in the reading that can help to make the Vukani project sustainable?
- Do you think Vukani could face any risks or dangers in the future? Explain.
- What ideas do you have to overcome these risks and make Vukani more sustainable?

STEP 3:

Understanding sustainability (20 minutes)

When both groups have finished discussing their stories, come together again and try to develop your own definition of sustainability. What can help a project's work to last and grow over the years, rather than just ending after a short time? Write as many things as you can think of in the space below.

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Sustainability is about whether a project is able to keep going once the outside source of funding has ended. So, you have to think about how a project will continue before it starts! Here are some important reasons why:

- To make sure the people who benefit from the project will continue to be served;
- To make sure the funder's resources are not wasted;

- To convince the funder that you have planned wisely for the future of the project;
- To make sure that what you have put into the project will not be lost.

Here are some strategies that could help to make your project sustainable:

- Look for other funders who can support the project and may have a long-term interest in the success of the project;
- Enter into partnerships with other institutions such as the municipality or a government department that could take over the project;
- Involve members of the community or the project beneficiaries themselves in planning for sustainability;
- Sell your knowledge and skills (like training) to other organisations, for example, to a government department in need of home-based care training;
- Cut the costs of the project, if possible.

Adapted from *From Paper to Practice – Strategic Planning and Project Development for Small Organisations*, CINDI Network, 2009

STEP 4:

From projects to community legends (40 minutes)

To end this meeting, think about how projects can have a bigger impact on their communities and beyond. Go back to the examples of Latita and Vukani, but also think about your own projects and others. Use these questions to guide you.

Questions for discussion:

- Are there ways for Latita and Vukani to connect with other projects to add up to a bigger movement for change? Share your ideas for how this could happen.
- What would need to happen for projects like Latita and Vukani to become inspiring 'legends' in their communities?
- Do you think these stories could help to break down the jealousy that we often see in communities? Do you have ideas for how to deal with this?
- If you want to start a project, or if you are already involved in one, are you thinking about how your project's success can 'spill over' to make your whole community stronger and more hopeful? Do you find it easy or difficult to think about this? Explain why.

Finally, to wrap up, read these notes together and share a few thoughts about them.

Even if people have good project ideas and achieve good results, they often don't think much beyond the project itself. But if a project is to be truly powerful and successful, it can never be only an end in itself. This means thinking about how one project can combine with other projects to have more impact. While working to achieve a project's objectives, it is important to see how these can also fit into a bigger vision for change in the community and the broader society.

This is the challenge to move from small thinking to big thinking. Often people say they are happy just to make a small difference in the world. Sometimes they even say they are happy if they can just touch one person. But if you think about it seriously, one person is not enough! Even 20 people or 100 people are not enough. It is a good start, but it is not enough! We need to push ourselves to work with others to achieve more.

This is also the challenge to move from 'project' thinking to 'movement' thinking. People involved in all kinds of different projects and organisations can work together to create a bigger movement for change. A good example is the Treatment Action Campaign (TAC), which works to make treatment available for people living with AIDS in South Africa. Over time, TAC has started to tackle other issues too. Other movements are even more ambitious. For example, there is an international movement to address the issues faced by people who live in informal settlements. Organisations and networks from several countries have come together under the umbrella of a movement called Slum Dwellers International.

Most people do not seriously believe that much can be done to change the way society works. Even if they don't like the way things are, they just keep going in the same direction. They feel powerless in the face of the huge economic and political forces that seem to control everything. To turn around this hopelessness, we need to change the way people think about action. We need a shift from 'head' to 'heart'. This was part of the winning magic in Barack Obama's presidential campaign. Most campaigns focus on strategy, tactics, objectives, and plans. All these things are important, but they are based on thinking and analysis – they come from the 'head'. The deeper and more powerful part of action comes from the 'heart' – people's anger, but also their sense of hope and possibility, and their willingness to take a risk. Stories are the secret to reaching the heart.

How can people involved in successful projects start telling the stories of their work to others so that they might also be inspired to act? How can your project story become part of a 'bigger story'? Always keep this in mind as you move forward.

STEP 5:

Evaluation (10 minutes)

Briefly reflect together as a group on how your study circle meeting went today.

Evaluation questions:

- How do you feel about today's study circle meeting?
- For you personally, what was the most helpful thing you learnt today?
- How well did people participate? Recognise useful contributions.
- What can you do better or differently next time? How can each member help?

Preparation for the next meeting

In the coming week, think about the most important things that you have learned from this study circle. Without going back through the whole workbook, what are the things you remember most clearly? What lessons do you want to put into practice straight away?

Meeting 9: Taking action

STEP 1:

Preparing presentations (45 minutes)

For the final activity, you can work in small groups or as a whole group.

Choose one of the following two options:

1. *If you are thinking about setting up an actual project in your community, prepare a short presentation on how you will go about doing this, taking into account everything you have learnt in this study circle. If a few of you will be working together on the project, then each person can present different aspects of your plan (identifying needs, mobilising resources, objectives and activities, monitoring and evaluation, sustainability, etc.).*

   OR

2. *You can prepare a presentation on some important things you have learnt that you think would be useful to share with others in your community who are running projects or about to start a project. Use your own words or language and your own stories to explain the main points.*

STEP 2:

Making presentations (1 hour and 15 minutes)

Get together and share your presentations. Each person should talk for less than 10 minutes.

STEP 3:

Final evaluation (30 minutes)

Reflect together as a group on all the time you have spent together as a study circle. Use the questions on the next page.

Evaluation questions:

- In what ways, if any, have you been able to use what you have learnt in the study circle in other areas of your life?
- What did you like about the workbook and the approach to study circle meetings? What would you like to change or improve?
- How well did you work together as a group? What good times do you remember? Were there difficult moments? How did you deal with these?
- Did you meet your goals as a group? Go back to page 2 to remind yourselves of what you said you wanted to achieve together.
- Did you achieve your personal goals?

Finally, thank each other for participating in the study circle meetings and celebrate what you have achieved together.

Good luck! Be bold! Believe in yourselves! Promote democratic citizen action!

Idasa would like to hear about your action. Phone us on (012) 392 0500 and ask to speak to someone from the iLEDA study circle project. We will call you back. Or write to us at PO Box 56950, Arcadia, 0007.

If you would like extra copies of this workbook, or materials for other study circles, also phone Idasa on (012) 392 0500. We can also give you information about training workshops for study circle leaders.

Appendix: How to register a non-profit organisation

Here is some information to assist you if you want to apply for your organisation to be registered. This information is taken from the website of the Department of Social Development, http://www.dsd.gov.za/.

The Non-Profit Organisations Act 71 of 1997

The Non-Profit Organisation (NPO) Directorate within the Department of Social Development registers organisations under the Non-Profit Organisations Act 71 of 1997. The primary purpose of this Act is to encourage and support organisations in a wide range of work they do by:

- Creating an enabling environment for NPOs to flourish.
- Setting and maintaining adequate standards of governance, accountability and transparency.

The Act provides a *voluntary* registration facility for NPOs.

What is an NPO?

An NPO is an association, company or trust that is:

(a) established for a public purpose, and

(b) whose income and property are not distributable to its members or office bearers except as reasonable compensation for services rendered.

Which organisations can apply for NPO status?

Any organisation that is not-for-profit and is not part of government can apply for registration. These include:

- Non-governmental organisations (NGOs);
- Community-based organisations (CBOs);
- Faith-based organisations (FBOs);
- Organisations that have registered as Section 21 Companies under the Company Act 61 of 1973;
- Trusts that have registered with the Master of the Supreme Court under the Trust Property Control Act 57 of 1988;

- Any other Voluntary Association that is not-for-profit.

The Directorate can only register an organisation that has a Constitution or founding document.

How long does the registration process take?

It takes about two months to process the entire registration. Once the Department receives the application, an acknowledgement letter is sent to the organisation. After that, a registration certificate follows if the application meets the requirements of the NPO Act.

How much does it cost?

It is free of charge.

How do organisations register?

Send the following documents to the NPO Directorate:

- A completed Application Form (which you can get from the Department of Social Development);
- Two copies of the organisation's founding document (i.e., a Constitution or a Deed of Trust or Memorandum and Articles of Association).

You can contact the NPO Directorate via any of the following routes:

Physical address:
HSRC Building
134 Pretorius Street
Pretoria
0002

Postal address:
NPO Directorate
Department of Social Development
Private Bag X901
Pretoria
0001

Phone number: (012) 312 7500

e-mail: npoenquiry@socdev.gov.za