MEL Systems & Reach

Kath handover notes

Wordworks
Changing lives through literacy

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1. PaMM & Project management system

Wordworks Project Management Matrix_ 2024

In October 2023 I presented my proposal for a more streamlined project management process: 2024 Project Management_Proposal . This process includes the use of the **P**roject **M**anagement **M**atrix (PaMM), training outlines, project internal reports and project matrices. As Wordworks has grown the need for strong systems has increased, especially as the programmes become more integrated and connected, and as team members work across ECD and SCP. PaMM was conceptualised as a planning and overview tool. If someone gets to PaMM they can navigate anywhere from there, through the linked project matrices. It was also intended to help give SMT and other units such as Comms an overview of the active projects and help facilitate transparency between the units.

1.1. Project index

- This tab has a list of all projects running this year. For this purpose the unfunded 'programmes' are being referred to as a project.
- There is a link to the project sheet within PaMM
- There is a link to the project matrix
- There is a link to the project internal report
- The reporting dates and funders are listed as well

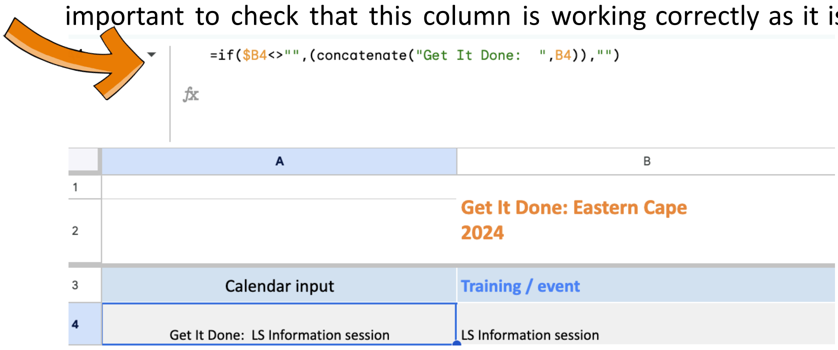
1.2. All events

- The events column is pulling from the consolidated events sheet
- Column A: is the source column and then the subsequent columns have VLookUp formulas applied to pull from the consolidated events tab
- This was done to try and keep the data stable if the sheet is filtered or sorted

1.3. Consolidated events

- This sheet consolidates all of the training events from the project tabs. In order for this to work the Column headings of the project tabs need to be the same for the columns you are pulling through

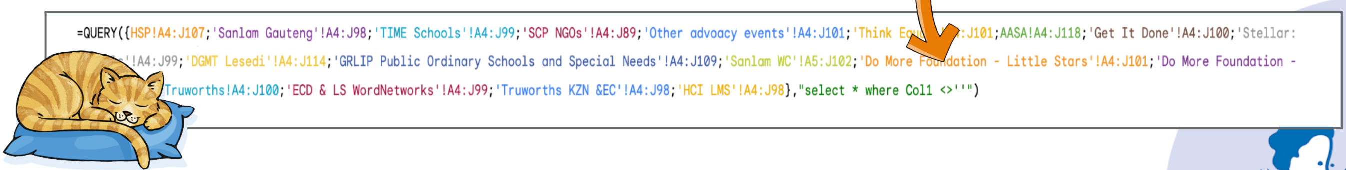
- This is the formula it is using can be seen in the screenshot below. It is a **=query** function which is pulling the data from **Cells A4 - J in each of the project sheets** (*{HSP!A4:J107; etc.*) when there is text is Column A *("select * where Col1<>"")*
- **If you add another project tab to PaMM you will need to add that sheet to this formula in the consolidated events sheet.**
- **If you rename a tab you will need to update this formula**
- **If you delete a tab you will need to remove the project sheet from this formula**
- Rows 1 -3 are heading rows and I didn't want to pull these in each time which is why I've only pulled in from row 4
- Column A is hidden in each of the project sheets as it is the calendar input. It is important to check that this column is working correctly as it is what pulls through to



the consolidated sheet and then the All Events tab
  - I've used the **=concatenate** function to join the project name and event if there is text in Column B
  - **If a new row is added the formula will need to be applied to the cell**
  - I've hidden the columns so that the programmes teams don't edit them by mistake

1.4. Project tabs

- These are where the training events relating to each project are being recorded
- This allows us to track how many events, the number of hours, languages, contact / online etc
- The outline and presentation for each event is saved which will then become an archive or record of what the training looked like in 2024. This will allow Wordworks to refer back as needed without needing to search through folders and different people's filing systems
- Where there are in person training events the scanned feedback and registers can be linked to the event in case we need to reference them
- For online sessions, the recordings can be linked
- The intention was that the project lead maintains their training section
- The sections below the training section were intended to be used to assist with planning for the project.
  - What does MEL need to do, what does Comms need to do, what physical materials do we need, what design will we need etc.



    - The intention behind this was to plan ahead as far as possible so that the support units are not receiving last minute requests.
    - We haven't been using these sections very much this year but I think they could be useful
    - My thinking is that the project plans are discussed and planned in the inception document and then can be added to PaMM once the project has been approved
    - This will help all of the units to be aware of what their role is within the project as well as helping with transparency between the units
- There is a tab for advocacy events where I was trying to capture how much time was being spent promoting our programmes at conferences, speaking at tertiary institutions etc but I haven't really checked in on the tab except reminding the team to record the sessions on a few occasions

2. Attendance workbook

Attendance Registers & Training Feedback 2024

This is the second year that we've used this type of workbook to track the attendance at all of our sessions. In 2023 there was a separate one for ECD and for SCP and this year I combined them into one workbook. I think it's working well and that everyone knows where to find their attendance registers. The workbook is linked in each of the project matrices and the index tab seems to be being well maintained by Christine and Elaine.

2.1. Workbook index

- As there are so many tabs this helps the team to navigate within the workbook. Christine and Elaine update this when they link the Google form register into the workbook.
- Columns E and F were added to help our MEL team to track whether they had processed the registers into the all attendance tab and the internal reports.

2.2. All attendance summaries

- This tab holds all of the summary tables from each of the sessions
- They are organised by project so just scroll across to find the one you're looking for
- The pivot tables all draw from the Roleplayer attendance sheet so the register needs to be processed and added there before the summary can be created
- These summaries often go into the internal reports but are also useful quick reference points

2.3. Roleplayer attendance

- This sheet is basically a consolidated version of all of the individual attendance registers - it's possible that the website will also be able to help with this function - we don't need to include internal training in this sheet (like the AASA ToT). It will assist with knowing how many people we engaged with at the end of the year
- Once the individual register has been processed the name and school/organisation is copy and pasted into this sheet and the programme, project, event name and date are added
- There are vLookUps that will pull district and province
- The first column has the **=Proper** function which will make sure the first letter of each name is capitalised in case the validation process missed this. This will ensure that we are able to count

unique names (Katherine de Wet and Katherine De Wet would be counted as two different names and we don't want that)

- The value in this sheet, even though it is a little bit of extra work is that we can count the number of unique schools and people across all our offerings. We could look and see which programmes were being attended by the same people, look for overlap, we can disaggregate by district and province across all of the training etc. It just gives us options of how we use our attendance data.
- What I did last year was add all of the attendance from the contact training (which is often tracked in the project matrix) once the training had finished so that we could include them in the count
    - For example, go into the Sanlam practitioner training data
    - Filter for the first training session and copy those names and the details into the roleplayer attendance sheet
    - Filter the for the second training session and copy those names and details into the roleplayer attendance sheet and so on
    - I would do it once the training has been completed and you know that the attendance data is correct

2.4. Individual registers

- Christine or Elaine will link the register into the workbook and add the link to the index
- I've just been through then all and added colour to make it easier to identify the tabs
- We need to process each register
    - Freeze the header row and columns (usually after the name of the school)
    - Validate the name and school
    - Use a VLookUp to pull through the phone number and email address from the Master contacts database
        - This allows us to double check we've validated the correct name
        - We are also able to see where we are missing contact details or if we need to update them
    - Add new roleplayers into the Master Contacts database and new partners into the Master Partner database
    - Once the register has been processed add it to the roleplayer attendance sheet as described above
    - If there is feedback you'll need to look at it and add anything relevant to the internal report
- If the training is going to have more than one session I find it's easier to have them all in one sheet which so it's easier to track attendance across the sessions
    - This means a new question needs to be added with the new attendance date and the previous one deleted (the data will stay in the response sheet). A new column will be added to the response sheet
    - Sometimes Christine forgets to add a new question and renames the existing one and this causes problems in the response sheet as the new responses will go into the existing column
    - This is fairly simple to troubleshoot as you can use the timestamp to figure out which session the responses are for and then you can check the cell history of the header row

in case the question was changed, make the new columns and move the data there. I find it's always useful to alert Christine if this has happened

- Sometimes people struggle to complete the register and then one of the programmes team will contact you and ask you to add them to the register. I just add a note in the timestamp column something like "email from Ntsiki 23/04/2024" so that there is a reference to why they were added. Don't forget to add their name, school and then response "yes" in the attendance column
- The ECD team tend to want to separate their feedback form and the attendance register, I would discourage this and just add the attendance question to the feedback form as it means that the participants need to fill in 2 Google forms in the same session and inevitable some don't. You'll see in the workbook there are registers for the ToT and then feedback forms for all of the sessions so I would suggest checking in with them and Christine on this. I think it'll be an easier experience for the partners if there is only 1 form to fill in
- **I have gone through all of the registers and added comments for Phill and Naaz in cell A1 where the registers still need to be processed - so please check!**

3. Certificate workbook

Certificates 2024

The purpose of this workbook is to track how many certificates we have issued in the year. It also serves as a record of what the certificate looked like that year. We need this information for the ELMA report. I started this in 2022 and it has worked well, here is the 2023 workbook as well.

3.1. Workbook index

- This has a list of all the certificate sheets in the workbook with the programme and certificate group
- There is a link to the sheet in the workbook which will always contain a mailing list as Christine will need to send the certificates after generating them
- A link to the certificate template - which if process has been followed Materials will have created
- In my ideal world the programmes teams would have used PaMM to plan their materials needs for the year, which would include planning for the certificates they know they are going to need and they would have sent these requests to the materials team at the beginning of the year.
- There is a link to the folder where the PDF certificates need to be saved. I generally make the folder and they are all here. It's in the MEL Shared Drive > 10.Organsational Reach Data > 2024 > Certificates. This way we can reference them if needed

3.2. All certificates: 2024

- I haven't populated this sheet yet but this is what I did in 2023. Basically the same as the All roleplayers sheet in the attendance workbook so that you can count unique certificate recipients and disaggregated by programme / project / province etc
- I suggest waiting until the end of the year and then going through and adding all of them as I don't think they will be needed before then

3.3. Individual certificate tabs

- These tabs will record which participants received certificates

- Add the name and copy across the VLookUP for the organisation, email address and province, if needed you can add district
- Sometimes there are different versions of a certificate (the EWC ToT for example also check the description in the ECD handover) and in those cases I add a column to indicate which certificate they received
- You can also pull through from the Master Contacts database if they have previously been trained in that programme as we won't issue another certificate
- You'll need to update the Master Contacts database to indicate the year that they were first trained in the programme
- You can add a tick box for Christine to use when emailing the certificates
- If the ECD team is training in person they will request certificates to be made for everyone who is eligible for the certificate if they attend the final session - **we need to follow up and remove the name and the PDF certificate from the folder if there are people you did not attend and therefore did not receive their certificate.** We don't want to count people who didn't actually receive the certificate.

4. Master Contacts Database

Master Contacts Database

This is our main database where all of the data for the individual people we interact with in any capacity is saved. It has evolved through a couple of iterations and there is room for improvement.

4.1. How to use this database

This is the first tab in the database and I tried to outline some guidelines for adding people to the database. I did this when we were asking Christine and Elaine to update email addresses and add interested people from the Expression of Interest Form. Note that Christine manages the EOI form but I think there is also room for improving how the information moves from the form to the relevant units. I suggest Thabisile brings it up in the Unit Leads meeting as something to stay on top of as I see there hasn't been any updates to the form since April.

4.2. Adding details

As all of our sheets are linked and we validate names based on who is in the Master Contacts database it is important that it is kept updated and accurate. Anyone who attends an online session or in person training with us needs to be added to the database. Generally we will request email address, school/organisation and phone number in the register. These can be used to add new roleplayers but also used as a VLookUp in the registers to make sure that we have chosen the correct name during the validation process. Please make sure that the name or a variation of it is not already in the database. Duplicates cause problems. Sometimes people use various forms/spellings of their name and this is why having the email address and phone number as a check is helpful. Unless we need to make a certificate it's OK if we aren't 100% sure of which is the correct version of their name. We add notes if people change schools or if their name has changed.

- Programme roleplayers

There are generally school, NGO or Education department officials. They are added if they attend any of our sessions.

- New employees and staff list

Details of new employees need to be added to the database and as people leave the organisation their roleyplayer type can be changed to Wordworks former staff. As someone new joins the team, ask Edeline to share their Employee Sheet with you as all of their details can be found on that sheet and you can then add them to the database.

- Board members

The list of current board members also need to be kept updated. You'll get this information from Colleen H.

4.3. Tracking programme engagement

This year we have tried to consolidate the various Roleplayer Databases (see number 6) into the Master Contacts as we were finding that many of the roleplayers were involved in multiple programmes, and the way we track attendance has changed with the transition to Google form registers. The website project should help manage all of this more efficiently.

Part of the need to do this is every time there was a new person or we updated someone's name in the Master Contacts database we would need to check in all of the roleplayer databases and update the validated name as they all pull from the Master Contacts database. I have also added the year that they were first trained in a programme into this database which needs to be maintained as we issue new training certificates. What we have done this year is as follows:

- Added columns for each of the programmes starting here
- We are marking if that roleplayer is active in that programme
    - To do this, we were using the ***Import sheet*** to import a register and then using a =***countif*** function to see who was on that register and then making sure that they are marked as active
    - The column with the function and import sheet then needs to be cleared as otherwise the workbook becomes too slow
    - I don't think this process has been done on the most recent registers so that is a piece of work that someone can pick up
    - There is a formula applied to column BT to mark if they are active or not, so if you add a new person please make sure that the formula is applied. This column replaces column Z which had to be updated manually
- Sometimes people are also active even though they have not attended a session, as they may want to receive programme information etc, then you can just mark them active
- Some programmes have a liaison person so where we know that we've added that as well
- Mailing lists can then be pulled from all of the active roleplayers for that programme
    - There is a column for NGO / School as sometimes the mailing lists need to be different
- We are also trying to track consent to programme communications and the newsletter. There are columns BV and BW
    - When you check if they are active by importing the register you can use the same process to check their consent status

- When a mailing list is included in the project matrix I will then filter for either those who have said yes or blank – so excluding those who don't want to receive programme communications
- This is very clunky but hopefully the website will resolve this as well

4.4. Unsubscribe: Google form and response sheet

Someone needs to turn on notifications for this Google Form and make sure that people who are unsubscribing have their email address removed from the database. Once it's removed it will be removed from all pivot table and VLookUps across all sheets but Christine will still need to remove them from the Mail Blaze lists so we alert her on this sheet.

4.5. Subscribe: Google form and response sheet

There is an option to subscribe to our newsletter on the Wordworks website. Someone needs to turn on notifications for this Google Form and manage the responses. Add the person to the database, their roleplayer type is *Wordworks newsletter general public subscriptions (people who are not under another category, but want to receive the newsletter)* and then add them to the consent to newsletter column. We didn't send out a newsletter in 2023 and haven't sent one out in 2024 yet so there probably needs to be some work done on this. We had this column and if Comms does want to send out a newsletter I would include all of the people marked in this column (unless they have since opted out) and include the option of unsubscribing as this will help us to know who does still want to receive the newsletter.

5. Master Partner Database

Master Partner Database

This is our main database where all of the data for the partners that we interact with is saved. It has evolved through a couple of iterations and there is room for improvement. **NOTE**: as so many of our sheets use VLookUps from the Master Partner Database adding or removing columns is a challenge as it will throw out all of the linked VLookUps. That is why we've added websites etc at the end of the sheet. I don't think there is a need to change this now as the website project will be creating a new system/database for all of this data anyway but it's good to be aware of.

5.1. Adding details

When we need to add a new school or organisation first double check that they have not already been added. Duplicates cause problems, **although note that there are a number of duplicates where it will say for example Chumisa Primary School HSP and Chumisa Primary School RSRW - we wouldn't do this now but it has not been changed yet. At some point they will need to be combined so that we have the historical data from both. We always use the HSP one.**

Add all of the details that you possibly can. If the school is part of the WCED you can check this WCED schools 021121 workbook for the district, quintil and EMIS number. We often need to disaggregate by province and Education District so make sure that those are added.

5.2. Tracking engagement with programmes

As partners sign up we will mark them as either an active *Managing Partner* (organisations who are training and managing the programme with their own sites) or an *Implementing partner* (ECD centres and schools who are using the programmes). Partners are considered active if we have engaged with them in an online session or if they have ordered materials. As the year progresses there will be partners

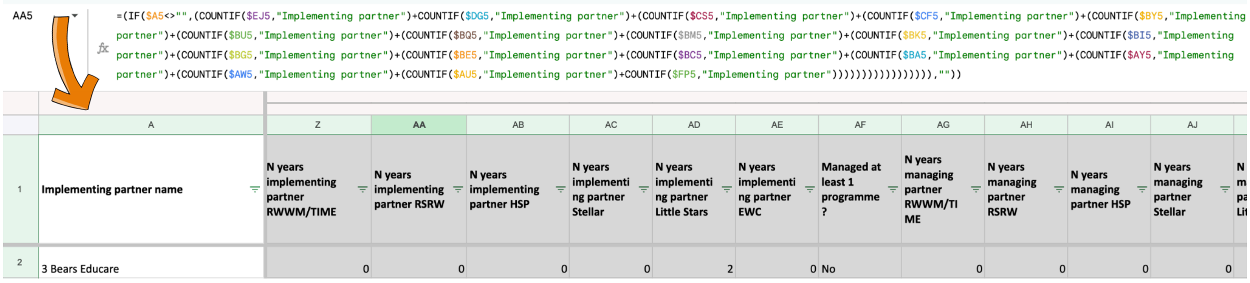
who signed up for programmes at the end of the previous year, who are marked as active so that we can communicate with them about the programme but they don't end up implementing so we need to change their status. This needs to be finalised at the end of the year. For ECD and HSP partners who attend training but don't implement I mark them as active but add a note that they did not implement. You will need to add a new set of columns for next year if the website database is not active yet.

- **During the year for reach count**

These columns will be the reference to which partners were active in the year. We use this to count the number of partners and disaggregate by province, type of partner etc. They will also inform who is added to the tracking sheet in the project matrix.

- **Across time**

There are a set of columns starting here which are set up to count how many years a partner has been active overall, and then per programme as well the year they were first active in each programme. The columns with formulas need to be updated to include the 2024 programme columns. Basically the new column needs to be added to this function. We should have done this when we set up the 2024 columns but I don't think we did, so someone will need to check that.



AA5

```
=(IF($A5<>"",(COUNTIF($EJ5,"Implementing partner")+COUNTIF($DG5,"Implementing partner")+(COUNTIF($CS5,"Implementing partner")+(COUNTIF($CF5,"Implementing partner")+(COUNTIF($BY5,"Implementing partner")+(COUNTIF($BU5,"Implementing partner")+(COUNTIF($BQ5,"Implementing partner")+(COUNTIF($BM5,"Implementing partner")+(COUNTIF($BK5,"Implementing partner")+(COUNTIF($BI5,"Implementing partner")+(COUNTIF($BG5,"Implementing partner")+(COUNTIF($BE5,"Implementing partner")+(COUNTIF($BC5,"Implementing partner")+(COUNTIF($BA5,"Implementing partner")+(COUNTIF($AY5,"Implementing partner")+(COUNTIF($AW5,"Implementing partner")+(COUNTIF($AU5,"Implementing partner")+COUNTIF($FP5,"Implementing partner")))))))))))))))),""))
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	A	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ
1	Implementing partner name	N years implementing partner RWWM/TIME	N years implementing partner RSRW	N years implementing partner HSP	N years implementi ng partner Stellar	N years implementi ng partner Little Stars	N years implementi ng partner EWC	Managed at least 1 programme ?	N years managing partner RWWM/TI ME	N years managing partner RSRW	N years managing partner HSP	N years managing partner Stellar
2	3 Bears Educare	0	0	0	0	2	0	No	0	0	0	0

- **Managing partner**

If a school is managed by an NGO partner (Mellon Educate, Beautiful Gate etc) and we have this information we add it into the managing partner column. Sometimes a school is supported by different NGOs for different programmes and that is why we had a separate managing partner column for TIME. Update these as needed. If a school doesn't not have a managing partner we add Wordworks as a the managing partner.

5.3. Mentor allocation

Once the schools have signed up for the year and we have marked them as active in that programme, the mentors will need a list of which schools they have been allocated to mentor. This process may change depending on what mentoring looks like each year. Basically you'll need to look at how many schools have signed up for HSP and TIME as these are currently the only programmes that we offer mentoring for, as well as if there are Think Equal schools and then allocate mentors. We try to keep the mentors with the same schools year after year if possible but we also need to make sure that the spread of schools to mentors is even. Colleen D has been the person to chat through this process with, and once we have the expectations from her, MEL creates a first draft of the mentor list and then this is run past the team and any changes are made. **NOTE:** some schools that sign up don't end up running the programme (they didn't order TIME materials or they didn't end up running HSP) and then we can remove them as we have confirmation that they are not active.

Colleen D has historically been allocated the Education Districts to mentor and Paulene the NGOs. In the ECD team, they mentor only partners and the allocation is per province. Natasha mentors the Western Cape, Asanda the Eastern Cape and Faith Gauteng and KZN. We add one column for SCP and one column for ECD as one partner may be running a programme from each age band and will therefore have 2 mentors. There may be changes with all of this with the website and programme alignment processes.

5.4. Tracking project schools

Columns are added as needed to be able to easily pull schools from certain projects, in 2024 the TIME sponsored schools, and the AASA schools for example.

5.5. Portal access

The process is detailed in the portal handover document Portal: Kath handover notes_June 2024

6. Roleplayer databases

Roleplayers databases

We used to use one database for each programme. This was where their training attendance was tracked as well as mailing lists and whether roleplayers were active or not. Over the last 3 years this has changed a lot as we now track attendance in the attendance workbook and the project matrix. One of the main reasons for this change is with the transition to online training, specifically for HSP, the team isn't always aware of who is 'in the room' as they were when it was in person. So we need to give them attendance updates and summaries and as such we have established the tracking sheets in the matrix. The same is true for the ECD projects, the practitioners being trained in Little Stars or EWC will have been added to the Master Contacts database with the year that they were trained so we have that record, the project matrix and the certificates workbook. The Master Contacts database is now working as a consolidated roleplayer database in addition to having contact details. Phill was part of the discussion and plan to do this so he should be able to give any more clarity on this decision.

More roleplayers are involved in multiple programmes than before and it was becoming unmanageable keeping all of the roleplayer databases up to date in addition to the matrices and the attendance workbook.

NOTE: The roleplayer databases are going to be incredibly helpful when you need to add the historic data to the new website database system and they are also a good reference point when we are checking who did what when. So while we are no longer maintaining them, they are still very valuable sources of data. If you need to check someone's HSP attendance from 2023 you would reference the HSP matrix instead of the HPS roleplayers database. So the project matrix and the attendance and certificate workbooks are your new main sources of data.

7. Reporting matrix

1. Reporting matrix

I put this workbook together to help manage the reporting process. The first tab is for ***Donor reports*** and has a list of all of our donors, what they are funding this year, the reporting dates and whether they were active in the year. This will help us to see donor retention across the years if kept updated. There is a sheet per donor with links to all of the documents needed for reporting per year. I tried to link in the proposal, grant agreement and then past reports for easy reference.

There is also a tab called ***Beneficiary reports*** where I was linking to the sheets for the organisations that we are providing funding to. 2024 is the first year that we have projects like Get It Done and Truworths where we are supporting partners to implement but then we have to report to the funder. So all of the systems and processes around this are being worked out as we go. We need the reporting dates for the partners to be decided upon and added here.

Colleen H will add the reporting dates to the calendar but I found it helpful to be able to have an overview of what reports were due and when in one place, rather than scrolling through the calendar. The workbook will need to be maintained and my suggestion is that it is held by Thabisile with input from Colleen H.

8. Reach calculations & ELMA reporting

8.1. General reach

The process for calculating the reach of each programme is detailed in that programme handover document. So please reference those. We only report on the number of children reached per year of implementation - so this is something to think about how we might be able to account for children being reached through practitioners who were trained previously and are continuing to use the programmes.

Programme	Handover document	Reach comes from
ECD	ECD WordNetworks: Kath h...	Partner reports & Wordworks direct practitioner training projects
HSP	HSP: Kath handover notes_J...	Programme reports
RSRW	RSRW: Kath handover notes...	Programme reports
Stellar	Stellar: Kath handover notes...	WCED - estimate of number of children GDE - estimate of the number of children Wordworks projects: AASA & Lesedi Partner reports: RED INK etc
TIME	TIME: Kath handover notes...	Materials distribution
Think Equal	Think Equal: Kath handover ...	Not counted as they are the same children who are reached through Stellar in the WCED.
App	n/a	Email Natasha (natasha@thereachtrust.org) at The Reach Trust for the app stats. I introduced Thabisile via email
Website	n/a	https://lookerstudio.google.com/reporting/10943539-e8a5-451e-a60a-2c8cf18c2096/page/W56QC

Reach Database is used to store as much of the data as possible **but** it is more of a reference and not all of the programme reach data can be drawn from directly. ECD for example we do our analysis in the

partner report workbook. The TIME data is also drawn directly from the TIME distribution sheet but then a summary is added to the Reach database so that we can track partners orders across years. So the reach database is more of a reference point.

You can find all of my working out here for 2022 and 2023. I'm hoping that the tables and working are all easy to understand and navigate, I did try to label them clearly. There are often comments or notes to provide more context, and if you follow any formula paths I'm sure you'll be able to understand my working.

- **Annual report**

We provide a summary of the reach stats to Jacs who then creates an infographic for the Annual report. We have used this template for the last 2 years. In addition to the stats I list all of the partner organisations so that she can include their logos. The active partners are drawn from the Master Partner database. It might be a good idea to add the list of donors as well if we want to acknowledge them.

That is the only data that MEL needs to provide for the annual report but it is also generally a good idea for MEL to be part of the team who does a proofread. The Annual Report is a Comms deliverable and they should initiate the process but I put the stats page together as soon as the reach numbers are finalised so that it is done.

8.2. ELMA report

The ELMA Foundation is one of the only organisations who gives us organisational funding. They require a report in February on everything we did in the previous year. It is a big piece of work but it is a good opportunity to make sure that everything from the previous year is wrapped up and forms the base for the Annual Report as Comms can draw everything they need to from it.

There is a Measure of Success (MOS) table that we need to complete each year and it is this that is the starting point for the reach working. I usually copy the table into a new workbook called ***Reach working [YEAR]*** and then I'll do all of my work there. I'll pull in the Master Partner database to count active partners, the certificates workbook to see how many people we trained, the ECD partner reports as we need to include the number of practitioners trained by our partners, the TIME distribution, HSP & RSRW tabs from the reach database etc. I also calculate the number of training sessions and hours spent, PaMM will be your data source for this so you'll need to make sure it's updated. Once the narrative report has been initiated you will work with Paulene (Head of Programmes) to put the report together, helping to provide context and insight in addition to data.

I also include a tab in the reach working workbook with links to the reports that we want to share although they will always be shared as a PDF.