

The Amy Biehl Foundation Trust
Notre Dame – South Africa Internship Program

**MIS FINANCIAL REPORTING
&
PROJECT MANAGEMENT FRAMEWORK**

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Introduction

The purpose of this brief paper is to provide a recap of the work that we did supporting the Amy Biehl Foundation (ABFT) in Cape Town, South Africa. Janey Ball, a financial consultant that supports the ABFT, approached us with several project ideas that would provide immediate support for several of ABFT's managers and processes. Two initiatives were identified that mapped to our skill sets and could provide value:

1. MIS Financial Reporting. The current month-end reporting processes which create management and donor based reports are heavily manual and labor intensive.
2. Project Management Training and Framework. A recent trend had developed with several projects facing difficulties during planning stages, communication about needs and implementation / project delivery.

This paper will provide a short background of the foundation, an overview of the information we gathered to gain an understanding of their MIS and Project Management needs, and lastly, will provide an example of the project management framework.

The Amy Biehl Foundation Trust

Mission of the Amy Biehl Foundation

The Amy Biehl Foundation aspires to be an engineer in the bridge building process between the world's privileged and less privileged; we use education, opportunity, interactive dialogue, and life skills as our tools.¹

Background of ABFT

The Amy Biehl Foundation was founded in the mid 1990's as a continuance of the phenomenal work of Amy Biehl to provide access to a better life for the previously disadvantaged people of South Africa. Following Amy's tragic death in Gugulethu Township in the Cape Flats area outside of Cape Town, Amy's parents created the foundation to facilitate programs and opportunities in the Cape. The foundation has evolved to include after-school activities, health programs, job and skills training, and sports and recreation activities supporting both young and old alike.

We had the privilege to participate in the Youth Day celebrations of June 16th and see the after-school programs and children in action. The event, staged in the Oliver Tambo hall in a Cape Flats township, brought together over 120 children for a several hour function including speakers, dancing, singing, and lunch. Youth Day truly was an opportunity for the kids to showcase their talents as one group danced the popular Sarafina dance, another displayed a traditional Zulu number, and a third displayed their acting abilities in a dramatic play.

MIS Reporting

The reporting process for the ABFT was a labor intensive task, normally requiring a week to generate a set of required month-end reports for funding agencies. The process involved extracting data from their Pastel accounting system, importing this

¹ www.amybiehl.org

data into Excel, and then manually manipulating the data to format reports as mandated by funding agencies.

To improve this process, we created a set of Excel macros which removed many of the manual steps required for report generation. In addition, we also presented a tutorial of Excel macros to the Amy Biehl bookkeeper for future improvements to other reporting tasks.

Project Management Framework

Through discussions with ABFT's Director of Programs, Solomon Macosana, we gained an understanding of the dynamics that impact project implementation and delivery within the foundation. Struggles impacting projects included: lack of documentation supporting an initiative, incomplete contingency planning for delivery, limited consideration of impact on other projects within ABFT, and no formal project wrap-up processes to capture lessons learned and project successes.

Solomon asked that we host a facilitated session with a number of his project managers dissecting the recent Youth Day event and to teach the managers how to use a project management framework in their daily work. The backdrop for the session included using the main objectives from Youth Day, comparing what was successful with what could have been better, and documenting a number of the lessons learned from the event. We have included an example of the Project Management Framework.

Wrap-up

While our work with the Amy Biehl Foundation was small in scope, both Solomon and Janey have assured us that this work has had a meaningful impact. The foundation is another clear example of good people in Cape Town attempting to assist the previously disadvantaged of South Africa and provide a path to a better life. We have learned a great deal from this and similar NGO's about reaching out to assist others and assist with creating opportunity.

Project Mgt Framework

| Scope | Plan | Develop | Implement |
|-----------------|--|---|---|
| What's in / out | Tasks <ul style="list-style-type: none"> - details - resources - time | Perform development tasks | Execute Final Plans |
| Background | Equipment <ul style="list-style-type: none"> - cost - timing | Test / Pilot the project <ul style="list-style-type: none"> - create and test implementation plans | Wrap up project <ul style="list-style-type: none"> - budgets actual vs. planned - lessons learned |
| Objectives | Financing <ul style="list-style-type: none"> - who - when - how much | Train resources | What is next? |
| Key Milestones | Contingency Planning | Continue contingency planning | |
| Stakeholders | | Equipment <ul style="list-style-type: none"> - acquire - setup - test | |
| Budget / Time | | Facilities <ul style="list-style-type: none"> - Available - Working power, systems | |
| Risks | | | |
| Outputs: | | | |
| Project Charter | Project Plan | Implementation Plan | Budget Documentation (planned vs. actual) |
| | Budget | Risk Plan | Lessons Learned Documentation |
| | | | Activity Recap - Results |