The Thogomelo Project

TRAINING COSTING MODEL

Handbook

social development
Department:
Social Development
REPUBLIC OF SOUTH AFRICA

USAID
FROM THE AMERICAN PEOPLE

PEPFAR
SOUTH AFRICANS AND AMERICANS
IN PARTNERSHIP TO FIGHT HIV/AIDS

Health and Welfare Sector
Education and Training Authority
HWSETA

Protect A Child

TRAINING COSTING MODEL

Handbook

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The Thogomelo Project

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Acknowledgements

Acronyms and Abbreviations

ABC	Activity-Based Costing
CCG	Community Caregiver
CD	Compact Diskette
CP SDP	Child Protection Skills Development Programme
DSD	Department of Social Development
FSA	Families South Africa
HDA	Health and Development Africa
HR	Human Resources
HWSETA	Health and Welfare Sector Education and Training Authority
IHAA	International HIV/AIDS Alliance
M&E	Monitoring and Evaluation
MER	Monitoring, Evaluation and Reporting
NGO	Non-governmental Organisation
PATH	Programme for Appropriate Technology in Health
PEPFAR	President's Emergency Plan for AIDS Relief
POE	Portfolio of Evidence
PSS SDP	Psychosocial Support Skills Development Programme
SDP	Skills Development Programme
SETA	Sector Education and Training Authority
TSP	Training Service Provider
USAID	United States Agency for International Development

Your guide to HWSETA terms and process

The Thogomelo Project

Gugu, what is accredited training all about?

Mandla, this poster tells you everything you need to know about accreditation.

1

What is SAQA?
The South African Qualifications Authority is the structure responsible for developing and implementing the National Qualifications Framework (NQF).

2

What is the NQF?
The NQF registers all the qualifications and unit standards in South Africa. It also helps to make sure that there is the same standard across all qualifications.

3

What is a SETA?
A Sector Education and Training Authority (SETA) is responsible for training within a specific sector, like the Health and Welfare sector. The SETA provides **learnerships, skills development programmes** and **qualifications**. It also provides the accredited certificates for learners.
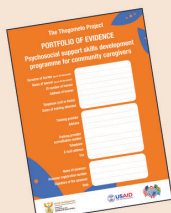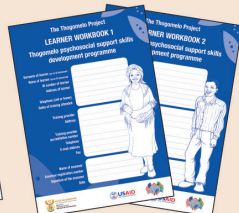
4

What is HWSETA?
A Health and Welfare Sector Educational Training Authority (HWSETA) operates in the health and social development sector and aims to create skilled people to meet the health and social development needs of all people in South Africa. Their mission is to create and implement appropriately skilled people who are empowered to provide quality health and social development services that meet international standards.

5

What is a qualification?
A qualification is the formal recognition that you, the learner, has achieved a set of unit standards with a set number of credits.

6

What is a skills development programme (SDP)?
An SDP is a job-based learning programme. If you complete an SDP, you will be awarded unit standards that contribute towards a qualification registered with the NQF. A learnership is a workplace-learning programme designed to lead you to a job-related qualification registered with the NQF.
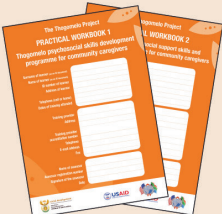
What is a portfolio of evidence?
A portfolio of evidence (POE) is a collection of all the evidence that shows that you have worked toward the assessment criteria and unit standards for a Skills Development Programme or qualification. You will hand in the POE to the Training Service Provider for assessment, moderation and verification.

The Thogomelo POEs are made up of:

- Portfolio of evidence
- Learner workbooks 1 and 2
- The two knowledge questionnaires (summative assessments);
- A certified copy of an identity document;
- An updated curriculum vitae; and
- Assessor and moderator forms.
- Practical workbooks 1 and 2

How can the Thogomelo SDP help you?
- If you complete the programme, you will get a certificate.
- You can get the unit standards and credits towards a qualification (look at your learner orientation pack for more information).
- You will develop knowledge and skills that you can put into practice in your daily work.
- You can share your experience of community caregiving with other people.

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What is verification?
This is the process where HWSETA checks that:
- the assessor and moderator have followed the standards;
- the training organisation has met the requirements of HWSETA; and
- the learners are competent.

10

What is moderation?
This is a process where a moderator checks that the work done by the assessor and the assessment itself were fair for all the learners.

9

What is an assessment?
This is a process of collecting evidence to show that you have achieved the expected assessment criteria and outcomes, as written in the unit standard. If you have met the outcomes and assessment criteria, you will be called **'competent'**. If you have not, you will be 'not competent'. If this happens, you will have one chance to re-do the evidence so that you can be 'competent'. You collect the evidence in your **portfolio of evidence** (POE).

8

What is a credit?
A credit is the total amount of learning that is needed for a specific unit standard and qualification. It is measured in 'notional hours'. As a learner, you will need to be involved in learning for 10 hours to be able to get one credit!

7

What is a unit standard?
A unit standard is a registered statement with the HWSETA. It has a set of **outcomes** and assessment **criteria**, as well as other requirements that you as the learner will have to meet. To get an accredited certificate, you must be competent in the outcomes and assessment criteria. The outcomes say what you will need to know or be able to do by the end of the learning programme. The assessment criteria are the knowledge and skills you need to have to put into practice in your work.

The Thogomelo Psychosocial Support and Child Protection Skills Development Programmes for Community Caregivers and their Supervisors.
Strengthening South Africa's capacity to care for its community caregivers and protect vulnerable children.

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Section one: Introduction

Welcome to the Thogomelo Training Costing Model.

The Costing Model consists of 2 items:
- this handbook and
- a Microsoft Excel® workbook, known as the costing tool.

Both are available on the Compact Diskette (CD).
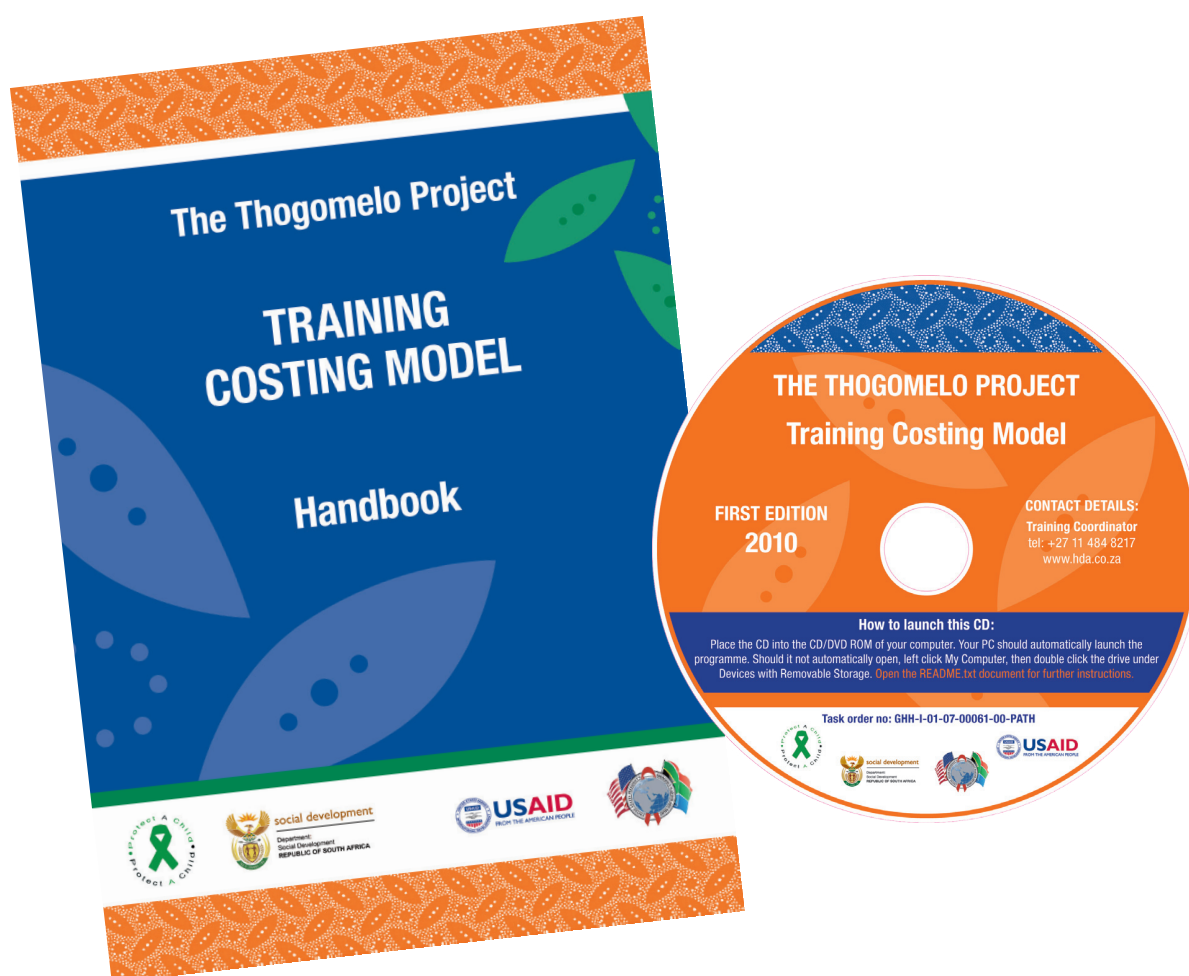
What is in the handbook?

The handbook contains the following information:

- In *Section Two* there is a brief overview of the Thogomelo Project and an explanation of why the need arose for a Costing Model.
- *Section Three* provides an orientation to both the handbook and the costing tool, as well as a description of how the Costing Model was developed.
- *Section Four* describes the three Thogomelo learning programmes and details all the activities that are covered in the Costing Model.
- In *Section Five*, key costing and budgeting information is presented.
- And, finally, *Section Six* provides an outline of the design of the costing tool and step-by-step guidelines on how to use the costing tool.

What is on the CD?

On the CD are the following:

- A *menu* to assist in moving between the different sections.
- An *MS Excel® workbook* made up of a number of Excel spreadsheets that make up the costing tool and can be used to generate a costing of selected activities.
- The *handbook* in pdf and MS Word® format, for easy reference.
- A *practical worked example* of the costing tool.
- A *listing of the cost drivers* for the costing tool, including suggested costings for every item.
- The *software required to install a PDF reader*, if this is not already installed on the user's computer.

Section two: Background to the Costing Model for the Thogomelo Project

What is the Thogomelo Project?

The Thogomelo Caregiver Support and Child Protection Training Project is a 5-year pilot programme funded by the US Agency for International Development (USAID). Working in partnership, the Program for Appropriate Technology in Health (PATH) as prime contractor, Health and Development Africa (HDA) and the International HIV/AIDS Alliance (IHAA) aim to strengthen the psychosocial wellbeing and child protection response of South Africa's community caregivers responsible for the care of vulnerable children. The Thogomelo Project works in close collaboration with the South African Department of Social Development to achieve this aim.

Training approaches and materials for supporting the caregivers of vulnerable children have been implemented across all 9 provinces of South Africa. At least 500 learners and their caregivers are trained annually by accredited training service providers based in the provinces.

To date the project has developed:

- An accredited skills development programme addressing the psychosocial wellbeing and support of community caregivers (CCGs) at levels 1 and 2 of the National Qualifications Framework (NQF). The training incorporates two modules on developing appropriate skills in child protection.

- An accredited curriculum offering more advanced child protection skills to the supervisors of community caregivers at level 3 of the NQF.

- A further curriculum offering Psychosocial Support Skills (PSS) for supervisors of CCGs to enable them so sustain organisational wellbeing will be implemented in year 3 of the project.

- Emerging Good Practice Case Studies, the first focusing on developing accredited curricula and the second on developing training service provider capacity to deliver quality accredited training. Further Emerging Good Practice Case Studies will be developed and disseminated through a seminar series.

- Capacity development programmes for provincial training service providers to enable them to meet the requirements of the HWSETA quality management system for accredited training. This includes training in Facilitation, Assessment and Moderation.

- Consolidation of results of the Rapid Assessment Phase into a report for dissemination to organisations in the field of child protection and psychosocial wellbeing of community caregivers.

- A caregiver toolkit comprising amongst other items a Child Protection Guide and Psychosocial Support Guide and Diary.

Across South Africa, the AIDS epidemic continues to affect every facet of society. Despite some prevention successes and major advances in treatment, communities and community members still struggle to deal with the impact of the epidemic, in particular with the ever-increasing numbers of vulnerable children.

To date, the primary response to this reality has been the national home/community-based care programme, which relies on a cadre of community caregivers (CCGs), trained to support and care for people living with HIV and their families.

In spite of the training the CCGs receive, two critical needs have emerged in the past few years. The first is the need for skills and ways to ensure the psychosocial well-being of the caregivers themselves. The second is the need for skills to respond to child protection violations. To remedy these issues, the Thogomelo Project was initiated in late 2008. *Thogomelo* means "caring" or "taking care" in Venda.

The aims of the project

The project aims to care for and protect vulnerable children in communities across South Africa by increasing the knowledge, abilities and psychosocial wellbeing of those who are responsible for them. With a dual focus – on CCG support and child protection – the project incorporates the best and most promising practices from Africa.

With funding from the United States Agency for International Development (USAID), the Thogomelo Project consortium[1] and the Department of Social Development (DSD) – nationally and in all nine provinces – work with non-governmental organisations (NGOs), carefully selected to be the project's Training Service Providers (TSPs).

> A Training Service Provider (TSP) is an organisation working in one or more area aligned to the Thogomelo Project's mandate, with specialist training capacity.

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1 The consortium is made up of the Programme for Appropriate Technology in Health (PATH), Health and Development Africa (HDA) and the International HIV/AIDS Alliance (IHAA)

The core function of the project

Three learning programmes, referred to as skills development programmes (SDPs), are the main resource of the Thogomelo Project; and accredited training that is delivered in accordance with the Health and Welfare Sector Education and Training Authority (HWSETA) requirements, is the core function of the project.

Reaching the Year One (2009) target of 600 learners trained has generated enormous demand for more training for CCGs. The intention is for training and capacity development of TSPs to be scaled up by DSD during and after the 5-year life time of the project (from 2013).

Why develop a Costing Model?

During the course of piloting the first skills development programme – the Thogomelo psychosocial support SDP for CCGs – it became clear that the ability to accurately cost the training itself and the associated HWSETA requirements for accreditation, like learner assessment, moderation and verification, was lacking.

There was no methodical way of identifying cost drivers and no standardised way of budgeting for the various activities.

It was thus recognised that a resource, such as a Costing Model, would greatly benefit DSD officials, TSP staff and others, both in the short term, during scale up, as well as into the future beyond the life of the Thogomelo Project.

> A cost driver is any factor that determines the cost of an activity.

Section three: Orientation to the Costing Model

What is the purpose of the Costing Model?

The Costing Model was developed as a flexible resource to facilitate planning and budgeting for a range of training-related functions.

How was it developed?

Building on examples of similar models, the parameters of the Costing Model – handbook and costing tool – were defined to include all training activities and all important steps and processes required by the HWSETA (excluding the steps required to achieve HWSETA registration).

Once drafted, the Costing Model was piloted in KwaZulu-Natal with a group representing DSD and the TSPs. Thereafter it was revised before use in workshops with participants from DSD (the HIV and AIDS and the Child Protection directorates) as well as the programme, training and administrative staff from all the TSPs contracted to Thogomelo in 2010.

Who will use the Costing Model?

There are potentially many users of the Costing Model. These include persons responsible for programmes, for training and for budgeting from:

- national, provincial and district DSD;
- TSPs;
- the Thogomelo Project;
- US President's Emergency Plan for AIDS Relief (PEPFAR) partners; and
- other training providers.

It is strongly recommended that the Costing Model is used by teams made up of persons with programme content knowledge, training experience and finance and budgeting expertise.

Section four: Parameters of the Costing Model

What are the key elements of the Thogomelo training?

The Thogomelo Project is committed to delivering quality learning programmes to CCGs and their supervisors that will provide the learners with credits towards qualifications and career pathing.

The three Thogomelo learning programmes[2] that have been developed are aligned with the HWSETA's unit standards. They are:

- the Thogomelo psychosocial support skills development programme (PSS SDP) for CCGs;
- the Thogomelo child protection skills development programme (CP SDP) for supervisors of CCGs; and
- the Thogomelo PSS SDP for supervisors of CCGs – due to be implemented in 2011.

A **learning programme** (defined in the HWSETA Glossary) means the combination of courses, modules or units of learning (learning materials and methodology) by which learners can achieve the learning outcomes for a qualification

A **skills development programme** is a cluster of unit standards that has been accredited by the HWSETA

A **unit standard** is a registered statement of desired education and training outcomes and its associated assessment criteria together with administrative and other information as specified in the regulations

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2 Recent policy and procedural changes within the HWSETA will replace the accreditation of skills development programmes, however the term – skills development programme – is used in the Thogomelo Training Costing Model as it was still relevant when the learning programmes were developed

What are the aims of the three Thogomelo learning programmes?

- The Thogomelo PSS SDP aims to build the knowledge and skills of CCGs in psychosocial support in the context of HIV and AIDS and the vulnerable child. The focus is on improving the psychosocial wellbeing of CCGs within CBOs, FBOs or NGOs.

Specific objectives are to:

- Build the skills of CCGs to manage stress and at the same time increase their coping and functioning so as to provide a quality service to vulnerable children and their communities.
- Build awareness of the dynamic relationship between the psychological and social aspects of life and how these elements influence the CCGs' wellbeing.

- The Thogomelo CP SDP aims to increase the capacity of supervisors in CCG organisations to act as child protection resource people within communities, in order to strengthen responses to child protection issues and to support individual CCGs to do the same.

- The Thogomelo PSS SDP for supervisors focuses on building skills that will ensure the institutional sustainability of the Thogomelo PSS and CP SDPs, primarily through support from supervisors for the CCGs in their organisations.

The project aims to care for and protect vulnerable children in communities across South Africa by increasing the knowledge, abilities and psychosocial wellbeing of those who are responsible for them.

How are the learning programmes delivered?

Under the Thogomelo Project, the learning programmes are delivered by provincial TSPs. These are organisations that meet very specific training-related criteria and that have been contracted to train a set number of learners.

The requirement is that the TSPs are registered with the HWSETA and accredited to deliver the learning programmes. The Costing Model does not cover the processes required for a TSP to register with the HWSETA.

Recommendations adopted by the TSPs:

- The maximum number of learners per course is 30
- The facilitators should also be trained as assessors and moderators

In respect of the materials used in the training, there will be instances where the materials are provided free of charge to the TSPs. In other instances these will need to be reproduced, with the associated cost implications. The materials to be used for each of the learning programmes are detailed in both the handbook and the costing tool.

Every three years, the unit standards covered in the respective SDPs expire. At this time, the materials used in the learning programme need to be reviewed for relevance with the new unit standards. In respect of the Thogomelo learning programmes, this task will, in the future, be led by DSD. As it is not possible to quantify the extent to which materials will need to be revised, then tested and produced, the Costing Model does not attempt to include this process.

What are the steps in the Thogomelo training process?

The following is a summary of the key steps followed for the PSS and CP SDPs (the PSS SDP for supervisors consists of only one block of training).

Summary of the key steps for the PSS and CP SDPs

Orientation day

Supervisors from organisations ensure that the learners meet the
learner selection criteria

Learners that are selected register as learners for the SDP and sign the
Orientation Day Pledge

The *facilitators/assessors* explain the accredited programme and the
commitment required from the learners

The *facilitators/assessors* explain the assessment and support process, and the role of
the *moderators* in the assessment/moderation/verification process

Supervisors and *managers* from organisations understand their roles, responsibilities
and the support to be offered to learners during and after the training

Block 1 training (5 days)

Learners undergo 5 days of training and complete *Learner Workbook 1* during training

Assessor assesses *Learner Workbook 1* and gives feedback for improvement

Practical workplace experience (3 weeks)

Learners conduct specific activities in the field and complete the tasks in *Practical
Workbook 1* for the Portfolio of Evidence (POE)

Learners receive support from the TSP:

Facilitator makes 1 visit per organisation, to mentor, coach and provide remediation

Learners receive support from their organisation:
Supervisor or *manager* mentors, coaches and provides remediation

Learners study for summative 1 to be conducted on Day 6 of Block 2

Block 2 training (5 days)

Learners hand in *Practical Workbook 1*

Assessor assesses *Practical Workbook 1* and gives feedback for improvement

Learners write summative assessment 1 on Day 6

Assessor assesses summative assessment 1 and gives feedback to learner

Learners undergo 5 days of training and complete *Learner Workbook 2* during training
Assessor assesses *Learner Workbook 2* and gives feedback for improvement

Learners write summative assessment 2 on Day 10
Assessor assesses summative assessment 2 and gives feedback to learner

Practical workplace experience (4 weeks)

Learners complete the tasks in *Practical Workbook 2* for their POE

Learners receive support from the TSP:
Facilitators and *assessor* make 2 visits per organisation, to mentor, coach and provide remediation

Learners receive support from the organisation:
Supervisor or *manager* mentors, coaches and provides remediation

Facilitators collect *Practical Workbook 2* at the end of Week 4

Assessor assesses *Practical Workbook 2* and gives feedback for improvement

Assessor gives overall feedback to the learner and gets sign off on each individual POE

Moderation of coursework and *Practical Workbooks* as POE

Verification

Verification of POEs by the HWSETA

Assessor or *facilitator* communicates results to learners

Certificates awarded to learners who are deemed competent

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What is covered in the Costing Model?

"Training" does not only involve classroom-based training, but includes a number of steps both before and after the actual workshops. These are all aligned to the requirements of the HWSETA.

The Costing Model parameters were defined to cover activities in four broad categories:

- *Learner training and support:* This involves all phases and activities to deliver the three learning programmes and then communicating the results to the HWSETA for verification.
- *Materials reproduction and distribution:* Materials are a critical input for training and activities to reproduce and distribute these are thus important ones to be factored in.
- *TSP capacity and competency:* There are many activities related to ensuring that TSPs are accredited and that their facilitators, assessors and moderators are registered and have the required capacity and competency to deliver the training.
- *Coordination, management and monitoring, evaluation and reporting (MER):* There are a range of activities, and thus costs, associated with coordination, management and monitoring and reporting, such as planning for training.[3]

These four areas are depicted at the top of the opposite page with learner training and support at the centre, linked to the associated processes. This categorisation of activities is used in the costing tool and in the description (at the end of this section) of the activities that can be included and costed.

Training does not only involve classroom-based activities. It includes a number of steps before and after the actual workshops.

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3 The Costing Model covers routine monitoring and reporting; it does not attempt to cost activities such as evaluation

Four areas of activities covered in the Costing Model
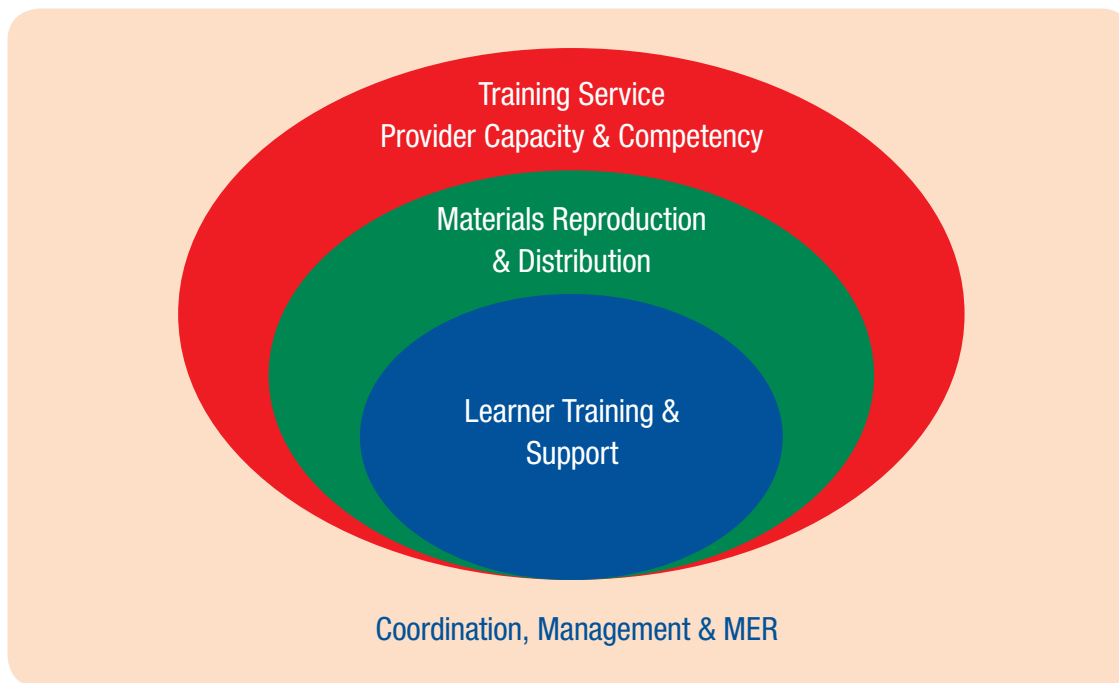
What activities need to be costed?

The Costing Model uses Activity-Based Costing or ABC as the way of identifying activities and cost drivers and then calculating budgets for sets of activities. For this reason, in the tables that follow, each activity is named and its objective described. Where it is relevant, additional explanatory points are noted.

The information in the tables, in turn, becomes the core input for the costing tool on the CD.

The tables cover the following (the costing tool worksheet reference is provided in brackets):

- Table 1: Learner training and support – PSS SDP   (PSS SDP)
- Table 2: Learner training and support – CP SDP   (CP SDP)
- Table 3: Learner training and support – PSS SDP
  for supervisors   (PSS SDP Spvr)
- Table 4: Reproduction and distribution of materials   (Training material costs)
- Table 5: TSP capacity and competency   (TSP)
- Table 6: Coordination, management and MER   (Coordination)

Table 1: Learner training and support – PSS SDP

Activity	Description
1. Preparation	
Learner selection **2 days**	Objective: To select 30 learners from identified organisations with CCGs, as per set criteria DSD leads the selection process, with TSP guidance to ensure that the specified selection criteria are adhered to
Pre-training meeting Facilitators/assessors and moderator **½ day**	Objective: To discuss the training and develop the facilitation plan, including learner support, assessment and moderation processes
Orientation day **1 day**	Objective: For the 2 facilitators/assessors and 1 moderator to introduce the learners to the programme and complete all the monitoring and evaluation (M&E) pre-training requirements, including the baseline survey, and the HWSETA registration forms It is strongly recommended that CCG supervisors are invited to attend the orientation in order for the facilitators to explain their role in supporting the learners (CCGs) in the field
Facilitators' preparation **2 days**	Objective: For the facilitators to prepare for the training, as well as to liaise with the learners to confirm all arrangements Facilitators/assessors plan for Blocks 1 and 2, as well as for learner support
2. Training	
Block 1 **5 days**	Objective: To conduct classroom-based training (Modules 1–5) The facilitators/assessors provide learner support during the training, start assessing and offer remediation to those learners who require it The learners start forming peer groups for personal support during the training and to continue in the workplace
Learner support and assessment of POEs **3 days**	Objective: For the facilitators to provide learner support in the field – following Block 1 Learners working in close proximity are clustered together and visited at the same time – the group size should not be more than 10 learners Each session can take up to half a day depending on learner needs Before the session the facilitator/assessor will have assessed the *Learner Workbooks* and identified gaps to inform the planning of the day Learner support is also provided for the practical field-based work
Facilitator debriefing **½ day (for the counsellor/mental health professional)**	Objective: To afford an opportunity for the facilitators to receive debriefing after training This could be an individual or group session with a mental health professional

Activity	Description
Block 2 **5 days**	Objective: To conduct classroom-based training (Modules 6–9)
	Learners write 2 Summative Assessments, 1 on Day 6 for Block 1 and the other on Day 10 for Block 2
	It is important for assessor to be present for Day 6 and Day 10
	Learner support and remediation also continue in this block
	The moderator attends 1 day during Block 2 to perform a moderation site visit and start the pre-moderation activities
Learner support and assessment of POEs **3 days**	Objective: For the facilitators/assessors to conduct learner support in the field following Block 2
	The role of the facilitators/assessors is to help the learners with gaps in their *Learner Workbook 2* but also to assist them with the practical which they must submit at the end of Block 2
Facilitator debriefing **½ day**	Objective: To afford an opportunity for the facilitators to receive debriefing after training
	This could be an individual or group session with a mental health professional
3. Assessment	
Overall assessment conducted by the assessor **3 days**	Objective: For the assessor to provide each learner with feedback against each unit standard
	Assessors assess each learner POE with all the *Learner Workbooks*. Feedback on the outcome of the assessments is communicated to each learner individually
	The assessor also explains the reassessment process where necessary and considers the way forward for the learner depending on their assessment results
	This requires the assessors to work closely with the supervisor in the organisation to ensure that the required resources are available for the assessment
Remediation (contingency) **2 days**	Objective: To provide a second opportunity for support and reassessment for learners who are not yet competent (as finalised by the assessor)
Assessor report **½ day**	Objective: To prepare a general assessor report for submission to the moderator on the performance of the learners and on the assessment

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Activity	Description
Post-training: feedback session on the facilitation, assessment and moderation **2 hours for each block of training**	Objective: A feedback meeting between the facilitators/assessors and moderator on the facilitation, assessment and moderation processes
4. Moderation	
Moderation of POEs (1 portfolio per day) **3–6 days**	Objective: To randomly select a minimum of 10–20% of the POEs to moderate and then complete all the moderator forms
Moderator reporting **½ day**	Objective: To finalise the report on the pre-, during and post-assessments The report is also based on the sampled POEs
5. Verification	
Verification – preparation **1 day for 1 facilitator/ assessor** **1 day for admin person**	Objective: For the assessor to apply for verification by submitting the HWSETA pre-verification form The pre-verification involves all the concerned parties – assessor, moderator, admin staff, facilitators and TSP management – working together to compile the required files for the HWSETA It also involves preparing each learner's POE
Verification – uploading learner data **1 day**	Objective: For the administrative staff to upload learners under the supervision of the assessor
Verification – attendance **1 day**	Objective: For all concerned parties – facilitators/assessors, moderator, administrative staff and management, including a percentage of learners – to attend the verification by the HWSETA (if there are less than 20 learners, all attend, otherwise 20% of the learners) The process involves the HWSETA verifying that the assessment judgments made were fair and complied with the standards set by the SETA The parties are required to clarify areas of uncertainty to the SETA representative
Post-verification meeting **(time not costed here)**	Objective: For all who attended the verification meeting to discuss the feedback from the HWSETA and to plan the way forward depending on the feedback This is an internal action for the TSP

Activity	Description
Remedial action **(time not costed here)**	Objective: For the assessors and moderator to remedy any identified problems from the verification
	This is an internal action for the TSP to correct any shortfalls identified in their Quality Management System (learner POEs, policies, forms and reports, etc)
Certification **1 day for management** **1 day for admin person**	Objective: To present (or alternatively distribute) certificates to all learners deemed competent against the unit standards
	Certificates must be signed by a person authorised by the HWSETA, with correct learner names, ID numbers and certificate numbers

Table 2: Learner training and support – CP SDP

Activity	Description
1. Preparation	
Learner selection **2 days**	Objective: To select 30 learners who supervise CCGs, as per set criteria
	DSD leads the selection process, with TSP guidance to ensure that the specified selection criteria are adhered to
Pre-training meeting Facilitators/assessors and moderator **½ day**	Objective: To discuss the training and develop the facilitation plan, including learner support, assessment and moderation processes
Orientation day **1 day**	Objective: For the facilitators/assessors and 1 moderator to introduce the learners to the programme and complete all the M&E pre-training requirements and HWSETA registration forms
	It is strongly recommended that managers are invited to attend the orientation in order for the facilitators to explain their role in supporting the learners after the training
Facilitators' preparation **2 days**	Objective: To prepare for the training as well as to liaise with the learners to confirm all arrangements
	Facilitators/assessors plan for Blocks 1 and 2, as well as for learner support
2. Training	
Block 1 **5 days**	Objective: To conduct classroom-based training (Modules 1–5)
	The facilitators/assessors provide learner support during the training, start assessing and offer remediation to those learners who require it

Activity	Description
Learner support and assessment of POEs **3 days**	Objective: For the facilitators/assessors to visit learners in the workplace following Block 1
	Learners working in close proximity are clustered together and visited at the same time – the group size should not be more than 10 learners
	Each session can take up to half a day depending on learner needs
	Before the session the facilitator/assessor will have assessed the *Learner Workbooks* and identified gaps to inform the planning of the day
	Learners complete the Workplace Logbook
Facilitator debriefing **½ day (for the counsellor/mental health professional)**	Objective: To afford an opportunity for the facilitators to receive debriefing after training
	This could be an individual or group session with a mental health professional
Block 2 **½ day**	Objective: To conduct classroom-based training (Modules 6–8)
	Learners write 2 Summative Assessments, 1 on Day 6 and the other on Day 10 (the Summative Assessment written on Day 6 covers content from Block 1; the second Summative Assessment is on Block 2)
	It is important for assessor to be present for Day 6 and Day 10
	Learner support and remediation also continues in this Block
	The moderator attends 1 day during Block 2 to perform a moderation site visit and start the pre-moderation activities
Learner support and assessment of POEs **3 days**	Objective: For the facilitators/assessors to visit learners in the workplace following Block 2
	The role of the facilitators/assessors is to help the learners with gaps in their *Learner Workbook 2* but also to assist them with the practical which they must submit
	Learners complete the Workplace Logbook
Facilitator debriefing **½ day**	Objective: To afford an opportunity for the facilitators to receive debriefing after training
	This could be an individual or group session with a mental health professional

Activity	Description
3. Assessment	
Overall assessment conducted by the assessor **3 days**	Objective: For the assessor to provide each learner with feedback against each unit standard Assessors assess each learner POE with all the *Learner Workbooks*. Feedback on the outcome of the assessments is communicated to each learner individually The assessor also explains the reassessment process where necessary and considers the way forward for the learner depending on their assessment results This requires the assessors to work closely with the managers in the organisation to ensure that the required resources are available for the assessment
Remediation (contingency) **2 days**	Objective: To provide a second opportunity for support and reassessment for learners who are not yet competent (as finalised by the assessor)
Assessor report **½ day**	Objective: To prepare a general assessor report for submission to the moderator on the performance of the learners and on the assessment
Post-training: feedback session on the facilitation, assessment and moderation **2 hours for each block of training**	Objective: A feedback meeting between the facilitators/assessors and moderator on the facilitation, assessment and moderation processes
4. Moderation	
Moderation of POEs (1 portfolio per day) **3–6 days**	Objective: To randomly select a minimum of 10–20% of the POEs to moderate and then complete all the moderator forms
Moderator reporting **½ day**	Objective: To finalise the report on the pre-, during and post-assessments The report is also based on the sampled POEs
5. Verification	
Verification – preparation **1 day for 1 facilitator/ assessor** **1 day for admin person**	Objective: For the facilitators/assessors to apply for verification by submitting the HWSETA pre-verification form The pre-verification involves all the concerned parties – facilitators/ assessors, moderator, admin staff and TSP management – working together to compile the required files for the HWSETA It also involves preparing each learner's POE

Activity	Description
Verification – uploading learner data **1 day**	Objective: For the administrative staff to upload learners under the supervision of the assessor
Verification – attendance **1 day**	Objective: For all concerned parties – facilitators/assessors, moderator, admin and management, including a percentage of learners – to attend the verification by the HWSETA (if there are less than 20 learners, all attend, otherwise 20% of the learners) The process involves the HWSETA verifying that the assessment judgments made were fair and complied with the standards set by the SETA The parties are required to clarify areas of uncertainty to the SETA representative
Post-verification meeting **(time not costed here)**	Objective: For all who attended the verification meeting to discuss the feedback from the HWSETA and to plan the way forward depending on the feedback This is an internal action for the TSP
Remedial action – contingency **(time not costed here)**	Objective: For the assessors and moderator to remedy any identified problems from the verification This is an internal action for the TSP to correct any shortfalls identified in their Quality Management System (learner POEs, policies, forms and reports, etc)
Certification **1 day for management** **1 day for admin person**	Objective: To present (or alternatively distribute) certificates to all learners deemed competent against the unit standards (as endorsed by the HWSETA) Certificates must be signed by a person authorised by the HWSETA, with correct learner names, ID numbers and certificate numbers

Table 3: Learner training and support – PSS SDP for supervisors

Activity	Description
1. Preparation	
Learner selection **2 days**	Objective: To select 30 learners who supervise CCGs, as per set criteria DSD leads the selection process, with TSP guidance to ensure that the specified selection criteria are adhered to
Pre-training meeting Facilitators/assessors and moderator **½ day**	Objective: To discuss the training and develop the facilitation plan, including learner support, assessment and moderation processes

Activity	Description
Orientation day **1 day**	Objective: For the facilitators/assessors and 1 moderator to introduce the learners to the programme and complete all the M&E pre-training requirements and HWSETA registration forms
	Managers are also invited to attend the orientation, in order for the facilitators to explain their role in supporting the learners after the training
Facilitators' preparation **2 days**	Objective: To prepare for the training as well as to liaise with the learners to confirm all arrangements
	Facilitators/assessors plan for both the classroom-based training and for learner support
2. Training	
Block 1 **5 days**	Objective: To conduct classroom-based training (Modules 1–4)
	The facilitators/assessors provide learner support during the training, start assessing and offer remediation to those learners who require it
Learner support and assessment of POEs **½ day per month for 3 months**	Objective: For the facilitators to visit learners in the workplace following the training and during the 12-week practical
	Learners working in close proximity are clustered together and visited at the same time – the group size should not be more than 10 learners
	Each session can take up to half a day depending on learner needs
	Before the session the facilitator/assessor will have assessed the *Learner Workbooks* and identified gaps to inform the planning of the day
	Learners complete the Workplace Logbook
Facilitator debriefing **½ day (for the counsellor/mental health professional)**	Objective: To afford an opportunity for the facilitators to receive debriefing after training
	This could be an individual or group session with a mental health professional
3. Assessment	
Overall assessment conducted by the assessor **3 days**	Objective: For the assessor to provide each learner with feedback against each unit standard
	Assessors assess each learner POE with all the *Learner Workbooks*. Feedback on the outcome of the assessments is communicated to each learner individually
	The assessor also explains the reassessment process where necessary and considers the way forward for the learner depending on their assessment results
	This requires the assessors to work closely with the managers in the organisation to ensure that the required resources are available for the assessment

Activity	Description
Remediation (contingency) **2 days**	Objective: To provide a second opportunity for support and reassessment for learners who are not yet competent (as finalised by the assessor)
Assessor report **½ day**	Objective: To prepare a general assessor report for submission to the moderator on the performance of the learners and on the assessment
Post-training: feedback session on the facilitation, assessment and moderation **2 hours for the block of training**	Objective: A feedback meeting between the facilitators/assessors and moderator on the facilitation, assessment and moderation processes
4. Moderation	
Moderation of POEs (1 portfolio per day) **3–6 days**	Objective: To randomly select a minimum of 10–20% of the POEs to moderate and then complete all the moderator forms
Moderator reporting **½ day**	Objective: To finalise the report on the pre-, during and post-assessments The report is also based on the sampled POEs
5. Verification	
Verification – preparation **1 day for 1 facilitator/assessor** **1 day for admin person**	Objective: For the facilitators/assessors to apply for verification by submitting the HWSETA pre-verification form The pre-verification involves all the concerned parties – facilitators/assessors, moderator, administrative staff and TSP management – working together to compile the required files for the HWSETA It also involves preparing each learner's POE
Verification – uploading learner data **1 day**	Objective: For the administrative staff to upload learners under the supervision of the assessor
Verification – attendance **1 day**	Objective: For all concerned parties – facilitators/assessors, moderator, administrative staff and management, including a percentage of learners – to attend the verification by the HWSETA (if there are less than 20 learners, all attend, otherwise 20% of the learners) The process involves the HWSETA verifying that the assessment judgments made were fair and complied with the standards set by the SETA The parties are required to clarify areas of uncertainty to the SETA representative

Activity	Description
Post-verification meeting **(time not costed here)**	Objective: For all who attended the verification meeting to discuss the feedback from the HWSETA and to plan the way forward depending on the feedback This is an internal action for the TSP
Remedial action – contingency **(time not costed here)**	Objective: For the assessors and moderator to remedy any identified problems from the verification This is an internal action for the TSP to correct any shortfalls identified in their Quality Management System (learner POEs, policies, forms and reports, etc)
Certification **1 day for management** **1 day for administrative staff**	Objective: To present (or alternatively distribute) certificates to all learners deemed competent against the unit standards (as endorsed by the HWSETA) Certificates must be signed by a person authorised by the HWSETA, with correct learner names, ID numbers and certificate numbers

Building on examples of similar models, the parameters of the Costing Model were defined to include all training activities and all important steps and processes required by the HWSETA.

Table 4: Reproduction and distribution of materials

Activity	Description
PSS SDP – materials for facilitators/ assessors and moderator	*Facilitator Guide*
	Assessment and Moderator Guide
	Model answers
	Learning materials: 1 set posters and related material per TSP p.a.
	Project banner: 1 per TSP
	Lulu DVD
	All materials provided to learners
	MER tools and guide (CD and hardcopies)
	Once off if facilitators/assessors and moderators remain the same
PSS SDP – materials for learners	Learner Orientation Pack
	Learner Manual
	Learner Workbook 1 and 2
	Toolkit
	Workplace Guide
	Workplace Logbook
	Practical Workbook 1 and 2
	Summative Assessment 1 and 2
	Psychosocial Support Skills Diary
	Psychosocial Support Skills Booklet
	Child Protection Booklet
	POE
	All provided to each learner
CP SDP – materials for facilitators/assessors and moderator	*Facilitator Guide*
	Assessment and Moderator Guide
	Model answers
	Learning materials: 1 set posters and related material per TSP p.a.
	Project banner: 1 per TSP
	Introduction to Children's Act DVD
	All materials provided to learners
	MER tools and guide (CD and hardcopies)
	Once off if facilitators/assessors and moderators remain the same

Activity	Description
CP SDP – materials for learners	Learner Orientation Pack
	Learner Manual
	Learner Workbook 1 and 2
	Workplace Guide
	Workplace Logbook
	Practical Workbook 1 and 2
	Summative Assessment 1 and 2
	Psychosocial Support Skills Booklet
	Child Protection Booklet
	POE
	Referral Guide
	CD Rom
	All provided to each learner
PSS SDP for supervisors – materials for facilitators, assessor and moderator	*Facilitator Guide*
	Assessment and Moderator guide
	Model Answers
	Learning materials: 1 set posters and related material per TSP p.a.
	Project banner: 1 per TSP
	All materials provided to learners
	MER tools and guide (CD and hardcopies)
	Once off if facilitators/assessors and moderators remain the same
PSS SDP for supervisors – materials for learners	Learner Orientation Pack
	Learner Manual
	Learner Workbook 1
	Workplace Guide
	Workplace Logbook
	Practical Workbook 1
	Summative Assessment 1
	Psychosocial Support Skills Diary
	Psychosocial Support Skills Booklet
	Child Protection Booklet
	POE
	Psychosocial Support Skills Supervisors' guide/CD Rom
	All provided to each learner

Table 5: TSP capacity and competency

Activity	Description
1. Training	
Facilitator content training **5 days for PSS SDP** **5 days for CP SDP** **3 days for PSS SDP for supervisors**	Objective: To ensure that facilitators are content competent to conduct the training The training focuses on content, methodology and specialist facilitation skills suited to the content/subject matter of the curriculum The assumption is that, at this level, basic facilitation skills are in place and that learners will have completed SETA-related courses
Facilitator training **5 days**	Objective: To ensure that each TSP has competent facilitators able to conduct training in terms of HWSETA requirements The training also ensures that facilitation and assessment is optimally integrated An independent provider conducts generic facilitator training, in accordance with SETA requirements The training focuses on generic facilitation principles
Assessor training **5 days**	Objective: To ensure that each TSP has a competent internal assessor The training also ensures that facilitation and assessment is optimally integrated An independent provider conducts generic assessor training, in accordance with SETA requirements The training focuses on generic assessment principles
Moderator training **3 days**	Objective: To ensure that each TSP has a competent internal moderator An independent provider conducts the moderator training The course is accredited and covers the moderation process and the SETA requirements Only accredited assessors can attend the course
Attrition retraining – contingency **5 days – content** **5 days – facilitation**	Objective: To secure sufficient trained and competent facilitators to deliver the SDPs A facilitator training session is conducted at the beginning of every year, however, should the need arise, the TSP may send their potential facilitators to the full 10-day training as learners (they would then be required to complete all workbooks and practicals)

Activity	Description
Facilitator refresher training **5 days**	Objective: To update facilitators, standardise SDP delivery and ensure quality control of training
Capacity development – specific areas **1 day per area**	Objective: To meet the capacity development needs of TSPs and enhance their functioning Each TSP has their own capacity development needs and the programme may offer capacity development to TSPs in areas such as MER, accreditation, financial management, etc Participants could be from admin, management, etc It could be training by an external trainer or by a partner with the necessary expertise

Table 6: Coordination, management and MER

Activity	Description
1. Planning and coordination	
Provincial planning meeting **1 day**	Objective: To discuss the provincial implementation plan including cost sharing between DSD and donors, training targets, the priority districts for training and roles and expectations of the various role players Attendees are from the TSP (for PSS SDP and CP SDP), donors, Provincial DSD (2 Directorates: HIV and AIDS and Child Protection) and, where relevant, District DSD
Provincial and district logistics planning day **2 days per SDP (pre- and post)**	Objective: For provincial and district DSD and the TSP to discuss the logistics for the training, cost sharing, the learner selection, transport, accommodation, etc

Activity	Description
2. Administration and management	
TSP contractual MER	Objective: To fulfil contractual monitoring and reporting requirements
	Activities include:
	- Preparation of narrative reports (per training)
	- Financial controls and reporting
	5% admin fee is allowable
	Office rental
	Communication
	Printing and courier costs
	Coordination costs for the national offices overseeing provincial TSP activities, where relevant
TSP SDP MER	Objective: To undertake training-related monitoring and reporting processes
	Activities include:
	- Pre- and post-training surveys (per training)
	- Baseline training surveys (per training and after 8 to 10 months)
	- Tracking and monitoring of learners
	- Mobile phone technology (data collation and reports)

Section five: Costing information

In this section a number of important costing concepts and terms are explained.

Costing and budgeting

Costing can be defined as determining the expenditure required to purchase the resources needed to undertake an activity. Costing activities permit us to:

- forecast expenditure for activities that are planned;
- identify the costs of implementing a programme, like a Thogomelo SDP;
- translate plans into monetary terms; and
- make decisions, such as choices between alternatives.

Budgeting, on the other hand, can be defined as the allocation of resources to match requirements. Once the cost of an activity is determined, the total number of desired activities will then determine the desired funding. The number of activities will be adjusted to fit the available funding, which will become the budget.

Together, costing and budgeting help the planning process by ensuring that the goals of a programme are financially affordable. Both are also important management functions.

Activity-based costing

Activity-based costing or ABC is simply a way of costing that breaks each activity into its component parts, costs each part and then totals these costs. This becomes a unit cost, which can be multiplied by the number of times the activity will be repeated.

The benefits of this approach are that it:

- assists in accurately costing each activity – through the process of identifying cost drivers and quantities;
- assists with allocating resources and controlling costs, which can be tracked at activity level and for individual cost drivers; and
- assists in eliminating unnecessary costs.

Some important principles to guide costing

The following pointers are provided to guide a costing exercise:

• Costing is about the establishment of budgets or planning for projected expenditure. When costing, one needs to consider all the activities that are required to achieve the proposed outcome.

• It is important to standardise costings. Set your unit costs, or cost drivers, and work within these.

• Ensure that all costs for all activities are included.

• When doing costing, common sense must prevail. Do not create an unrealistic picture or plan for things that will not be attainable. You need to work within the available budget and remember the constraints of human resources (HR) as well – you need people to carry out the planned activities. Bear in mind the economic principle of scarcity!

• Through costing one reaffirms priorities. Often decisions need to be made and activities cut or reduced. Through this priorities are reaffirmed.

• The effective implementation of programmes is impeded without costing.

• Detailed, ABC-based costing encourages accountability and transparency.

Direct and indirect costs

Direct costs are for items such as training materials, facilitation fees, equipment hire and so on. *Indirect costs* may include the use of a TSP venue for a meeting, loan of DSD training equipment, electricity and so on.

The costing tool focuses on direct costs and does not attempt to calculate indirect costs.

In the costing tool some allowance is made to recover indirect costs within the worksheet which deals with coordination, management and MER; in addition, a small percentage can be added to the total cost to contribute towards the overhead costs of a TSP

Overhead costs

These are the general expenses of running an organisation, and range from rent, to administrative costs, to taxes and marketing costs. *Overhead* costs are either fixed or variable. *Fixed costs* relate to expenses that must be met every month, regardless of the level of activity the organisation is engaged in. Fixed costs include rent or mortgage payments, depreciation on vehicles and equipment, insurance and accounting costs.

Variable costs do tend to fluctuate depending on the type and level of activities the organisation engages in. This category of expense could include communication costs or office supplies.

In the costing tool there is provision to include overheads as a percentage of the total cost of the management and coordination functions of a TSP.

Cost drivers

A *cost driver* is any factor that determines the cost of an activity. Cost drivers are analysed as part of activity-based costing so any factor, such as a venue cost for a workshop, or printing costs related to materials developed are seen as cost drivers. It is important to ensure that cost drivers are accurately recorded as they impact directly on the costing of activities. When doing a multiple year costing, always remember to calculate the impact of inflation on costs.

When costing, one needs to consider all the activities that are required to achieve the proposed outcome.

For the costing tool, the following cost drivers have been used:

Category & cost item	Description	Suggested rate (2010)
Human resources		
Facilitators/assessors	Trained facilitator/assessor who facilitates training sessions	R 1 200
Moderator	Trained moderator – external to training sessions	R 1 500
Administrator	Person offering administrative support	R 600
Uploading data	A set rate paid to person who uploads the learner data	R 50
Counselling/therapy	A group debriefing session for facilitators	R 400
TSP management	Include when management staff are directly involved in an activity	R 1 200
Master trainer (content or HWSETA specialist)	A person contracted to provide specialist training	R 1 500
Moderation rate	A set rate paid to a qualified person to moderate portfolios	R 550
Guest presenter	A person invited to an event to make a presentation	R 1 500
Event general costs		
Equipment hire	Daily rental for equipment hire – e.g. rental of data projector and laptop	R 500
Venue hire	Daily rental for venue hire – e.g. hall rental	R 1 000
Handouts/packs	Total cost of the handout pack/workshop folder provided. May include a plastic pocket/folder, pen and notepad. Does not include any training materials. Not used for every training event. If not provided – do not include a costing	R 40
Printing of certificates	Include cost of printing the certificates for presentation to "graduates"	R 10
General printing	Include cost of general prints provided, e.g. programme, attendance register. Do not include handouts or materials provided in the workshop folder	R 0.50
Courier cost (zones 1 & 2)	Cost of sending training materials to the venue. 2 zones are provided for and costs may differ across these 2 zones; 1 rate may be set for areas close by (zone 1) and a different rate set for far outlying areas or venues in other provinces (zone 2)	R 35 & R 70
Training material packages for various learning programmes	The materials for the various learning programmes are costed out separately	

Category & cost item	Description	Suggested rate (2010)	
Accommodation, meals & refreshments			
Full board	Full charge for accommodation, including dinner and breakfast (per person)	R	550
Full conference (lunch & 2 teas)	Also called a daily conference fee – to include lunch and 2 teas, but no accommodation (per person)	R	70
Half-day conference (lunch & 1 tea)	Daily rate charged by venue for lunch and 1 tea	R	50
Catering for meeting	Includes offering tea/coffee and snack at a meeting (not full lunch or conference costs)	R	20
Transport & allowances			
Airfare	Return airfare – usually for guest speaker or specialist brought in	R	2 500
Travel reimbursement (per km)	Reimbursement paid for travel to facilitator, assessor and others involved in running the training programme or conducting field trips. Claimed against a log book/ form	R	3
Travel allowance for supervisor: CCGs	Allowance paid to the supervisor of CCGs when attending a meeting or session	R	75
Reimbursement for learners (zone 1 & 2)	Transport reimbursement paid to learners – consider if taxi is shared or allowance paid per person. The costing tool allows for a different rate to be set for 2 zones. (e.g. 1 rate set for zone 1 which is in close proximity and a different rate for zone 2 for the far outlying areas)	R & R	60 200
Per diem allowance	An allowance paid for out of pocket expenses, or when people are working in the field. Need to consider if full accommodation is being provided – then only provide an allowance for incidentals. Per diems are generally only paid when people are away from their offices for more than 24hrs	R	350
Administrative costs/overheads/indirect costs			
Provide a % at which overhead costs will be calculated	Once the percentage is provided – this is calculated based on actual programme costs. At present USAID allows a maximum of 5% for overheads	5%	

The following steps are provided as a guide to develop costings:

Step 1: Identify activities to be undertaken

Step 2: Identify factors that determine the cost of an activity (set cost drivers)

Step 3: Cost each activity and quantify level of activity

Step 4: Add up and balance according to budget and human resources available

Section six: Design of the costing tool and general guidelines

Design of the costing tool

The costing tool has been developed using Microsoft Excel® software. The tool is structured across a number of different worksheets, within one workbook. There are links built in across the worksheets and formulae are used to make the necessary calculations. Much of the routine work of costing has been automated for you as the user.

Before using the tool for the first time, familiarise yourself with the structure of the tool.

Title and cost driver

Provides a key to the different formats used in the tools and allows the user to set the cost drivers – both the description and the unit cost. Suggested rates (based on the Thogomelo Project experience) are provided as a guide. The user should set the unit costs. The percentage to be charged for overhead costs is also set on this worksheet.

Guide

Provides step-by-step guidelines for using the costing tool. For first-time users it is important that they work through this section carefully.

Menu

Provides a "Table of Contents" for the various parts of the costing tool and includes hyperlinks to different parts of the tool. A hyperlink is a marked word that the user can click on to move to a new section within the costing tool.

Training material costs

Provides a detailed listing of the training materials linked to each learner training course. This sheet is used to determine the costs for the training packs, as each item included in the pack has to be costed out separately.

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Learning programmes

Provides a separate worksheet for costing each of the learner programmes: PSS SDP, CP SDP and PSS SDP for supervisors. The various activities required to effectively run a learning programme are costed separately.

TSP capacity and competency

Provides for costing the training and capacity development courses that TSPs may need to conduct to develop their own internal capacity. Some of the training programmes conducted may be aligned to the HWSETA requirements – so staff members may be trained as assessors or moderators, they may be trained in the content of the various learning programmes or run specific courses for in-house development, such as financial management, project management, or MER. These courses are costed separately.

Coordination, management and MER

Provides for costing aspects relating to all aspects of planning, coordination, administration and management, as well as routine MER.

Planning

This sheet assists the user to consider a number of planning issues and play out a number of different scenarios:
- The unit cost per learner is calculated throughout.
- Users can estimate the number of learning programmes that can be conducted with a given budget.
- Users can estimate the budget that will be required to reach a targeted number of learners.
- They can also estimate the number of facilitators/assessors and moderators that will be required to run a targeted number of learning programmes.

Summary

Provides a summary of the costing of the various aspects of the programme. The summary costs are picked up from the various worksheets and combined on a single sheet to see the overall cost. It is on this worksheet that the overhead costs are calculated too, according to the settings provided on the "Title" page.

Summary – by category

Provides a summary of the costing of the various aspects of the programme, by costs category, e.g. human resources, transport and allowances, training materials, etc. As before, the summary costs are picked up from the various worksheets and combined on a single sheet to see the overall cost. It is on this worksheet that the overhead costs are calculated too, according to the settings provided on the "Title" page.

Key to using the costing tool

Included on the "Title" worksheet is the following key to using the tool. These different formats are standardised across the costing tool.

	You are required to make entries in the areas marked with a pale orange fill. Other areas in the worksheet are locked or protected from users making entries or changes or deleting critical parts of the tool.
abc	All calculated fields are shown in orange font.
abc	Text in italic, *green* font provides guidelines on the tool, or explains what is required of you to use the tool effectively
abc	Indicates that this information is linked to another entry (another cell in the worksheet). Avoid making changes or deleting!
abc	Text has specifically been typed in. Remember, this may be the source to a link to other parts of the tool – so be careful when making changes
Go to ...	By clicking on this text (a hyperlink) you will be taken directly to the place described, e.g. the menu or title page. You can also use the blue arrow to take you there.
abc	Indicates that an explanation is provided, as a comment. Move the mouse over the cell and the comment will be displayed.

The Costing Model should be used by teams made up of persons with programme content knowledge, training experience and finance and budgeting expertise.

Example of a screen shot

Thogomelo Project

THOGOMELO TRAINING COSTING MODEL TOOL

Version 1: Sept 2010

Go to menu ...

Learner Training - Psychosocial Support Skills Development Programme

1.2 Pre-training meeting

½ day meeting with facilitators/assessors and moderator to discuss training and develop facilitation plan, including learner support, assessment and moderation processes

	Rate description		Rate/ Unit cost	No of days/ km/ pages /packs	No of people/ vehicles		Cost (ZAR)	Comments/Notes
HR fees								
Facilitators/Assessors	Day/person	R	1 200.00	0.5	2	R	1 200.00	Only half day meeting
Moderator	Day/person	R	1 300.00	0.5	1	R	650.00	
.... Other HR	0	R	-			R	-	
General costs for meeting/training								
General Printing	Page	R	0.50			R	-	internal costs
... other general costs (event)	0	R	-			R	-	
Accommodation, meals & refreshments								
Catering for meeting	Per person	R	20.00			R	-	
... other meals and refreshments	0		0			R	-	
Sundries								
Other costs that may be incurred						R	-	
Sub total						R	1 850.00	

Title & Costs Drivers
Guide
Menu
Training Material Costs
PSS SDP
CP SDP
PSS SDP Spvr
TSP
Coordination
Planning
Summary
Summ-cat
+

Describes the section you are currently working on

Indicates that a comment is provided – move your mouse over the cell to view the comment

The hyperlink or arrow allows you to return to the menu

These entries are fed through from other parts of the worksheet

Indicates that you are required to make an entry

Indicates a calculated field, using the information provided

Different parts of the Tool are provided on separate worksheets

Sub-totals are calculated for each sub-section

Allows you to make notes or add comments

Required Microsoft Excel® skills

The tool assumes that the user has some working knowledge of Microsoft Excel® and can navigate through the workbook. The user will need to have the following minimum Excel® skills:

- Opening a Microsoft Excel® workbook
- Saving the workbook under a different name and in a suitable directory
- Navigating within a worksheet – moving between cells, rows and columns
- Moving between different sheets within a workbook
- Entering or editing numeric data and text
- Using the horizontal and vertical scroll bars
- Using hyperlinks to move between different sheets within a workbook. For example: “Back to menu...”. By clicking on the hyperlink the user is taken directly to the appropriate place within the workbook
- Widening columns
- Saving a workbook once work in it is completed
- Reading a comment, linked to a specific cell on a worksheet

Extra skills would be:

- Setting a print area
- Copying parts of the workbook from Microsoft Excel® into other applications

The costing tool is designed to be used as a spreadsheet. It is not intended to be printed out as it would be too big to work with. However, should the user wish to print certain parts of the tool – use the Microsoft Excel® "print area" function to print the selected section. Parts of the tool can also be selected and copied into Microsoft Word® or other software applications as required – use the select, copy and paste function to do this. Generally the parts are pasted across as tables.

The workbook does not have any sheets, formulae or cells hidden. Where suitable, hyperlinks or formulae have been provided to automate routine processes for the user. Do not break the links (typically this happens if you delete worksheets or rows within a worksheet). Also, do not remove or overwrite any of the cells with formulae.

The main principles behind using the costing tool are:

- If you do not need it, ignore it.
- Do not delete – merely hide (The tool is protected to stop you from deleting critical information).
- Avoid double costing at all costs!

Setting cost drivers

Setting the unit costs for each of the cost drivers is probably the most critical part of using the tool. This is done on the "Title" page and filters through to every other worksheet in the tool. The master copy of the tool, provided on the CD, does not have any unit costs inserted. You, as the user, need to set up the unit costs for each of the cost drivers, i.e. consider the unit cost to be paid per km for the use of a vehicle, or the daily rate charged by a translator who is contracted to do some work.

The "Title" page does provide "suggested rates" for the cost drivers. The suggested rates are provided at July 2010 rates, given the experience of the Thogomelo Project.

Below are some issues to consider when setting up your cost drivers:

- Remember that these costs are standardised across the whole tool. You are therefore required to set standard rates to apply to every aspect of the tool. Once the cost is set on the "Title" page it is carried through to the rest of the tool.

- The unit of costing is important. The unit to be used is described on the "Title" page. Carefully consider the rate description, or unit for each of the cost drivers – for example a daily or hourly rate.

> **Hint!** As a comments/notes column is provided, it is good to document the decisions you have made as you go along, so you can always refer back to this; and others viewing the tool can also follow the comments.

- On the "Title" page you can change the description of the cost driver that is provided, along with the rate description and unit cost.

> **Hint!** You should just change the particular line item, e.g. "Administrator" may be replaced with "Administrative clerk" or whatever term you use to describe that person.

- For each category of cost, the user is given the opportunity to add his or her own specific unit cost in the field marked "… other". Again, the rate description and unit cost needs to be set.
- With some of the cost drivers, 2 levels are provided – e.g. courier costs. This is to allow for some flexibility. You may wish to choose 1 level for the courier costs for local areas and another level for the outlying areas.

> **Hint!** Change the description to match the unit costs you have determined, e.g. courier costs 50km radius; and courier to rural areas. If you only need 1 rate, then only use the 1 cost category and adjust the description accordingly.

- You may elect not to use all the cost drivers provided – just leave these blank. Do not delete as the functionality of the tool will be affected by the deletion.
- When setting levels of fees to be charged, consider what is included in the fees. For example, does the consultant's fee include a per diem or a travel allowance? If so, then when costing the per diem and travel allowances for others, remember to exclude the consultant in the quantity (for the number of persons) that is reflected.
- Remember that the costs and descriptions provided on the "Title" page feed throughout the tool. If you change them on the "Title" page, they will change in every cell which is linked to that specific place in the "Title" page.

When costing out activities, you will generally be provided with an option to add "other costs that may be incurred". This allows the user some flexibility; you can add a description, unit cost and quantity specific to the activity. This costing is not automatically linked to any other part of the tool – although the user may choose to repeat the costing in other activities.

Example of setting the cost drivers

	Rate description	Rate/ Unit cost		Explanation	Suggested rates		User's notes
Human Resources							
Facilitators/Assessors	Day/person	R	1 200	Trained facilitator/assessor who facilitates training sessions	R	1 200	
Moderator	Day/person	R	1 300	Trained moderator - external to training sessions	R	1 500	
Administrator	Day/person	R	600	Person offering administrative support	R	600	Use internal staff only
Uploading data	Portfolio	R	50	A set rate paid to person who uploads the learner data	R	50	Admin staff to be tasked
Counselling/therapy	Hour	R	400	Hourly rate for therapist to work with facilitators (not intended for learners)	R	400	Will need to contract in
TSP management	Day/person	R	1 200	Include when management staff are directly involved in an activity	R	1 200	
Master Trainer (Content or HWSETA Specialist)	Day/person	R	1 500	A person contracted to provide specialist training	R	1 500	
Moderation Rate	Portfolio	R	550	A set rate paid to qualified person to moderate portfolios	R	550	
Guest Presenter	Day	R	1 350	A person invited to an event to make a presentation	R	1 500	Will Invite Dr Smith
…. Other HR				User can add additional HR person if required			
Event general costs	Rate description	Rate/ Unit cost		Explanation	Suggested rates		User's notes
Equipment hire	Day	R	-	Total daily fee for the hire of equipment, such as PA system, or video player	R	500	No cost invovled
Venue hire	Day	R	-	Daily rental for venue hire - eg hall rental	R	1 000	No cost invovled
Handouts/packs	Trainee	R	40	Total cost of the handout pack/workshop folder provided, may include a plastic pocket/folder, pen and notepad. Does not include any training materials. Not used for every training event… if not provided - do not include a costing	R	40	
Printing of certificates	Portfolio	R	10	Include cost of printing the certificates for presentation to 'graduates'	R	10	Need to outsource
… other general costs (event)				User can add additional event related costs if required			
Training Materials & Resources	Rate description	Rate/ Unit cost		Explanation	Suggested rates		User's notes
General Printing	Page	R	0.50	Include cost of general prints provided, eg programme, attendance register. Do not include handouts or materials provided in the workshop folder	R	0.50	
Courier cost (zone 1)	Pack	R	35	Cost of sending training materials to the venue. Two zones are provided for and costs may differ across these two zones; 1 rate may be set for areas close by (zone 1) and a different rate set for far outlying areas or venues in other provinces (zone 2)	R	35	Will be for local courier
Courier cost (zone 2)	Pack	R	70	If needed a separate rate could be set for an alternate drop off point - allowing for a different distance and hence a different rate.	R	70	will be for courier across province
Psychosocial Support Skills Development Programme - facilitators/assessors and moderator	Facilitator	R	2 246				

The user sets the rate and can also modify the description provided. These changes are fed through to all relevant parts of the costing tool

Indicates that this is fed through from another part of the costing tool (Training materials worksheet)

Each category within the costs drivers, allows the user to add in one, (very context specific) cost category. Provide a description, rate description and unit cost

Rates are suggested as a guide at July 2010 costs and given the experience of the Thogomelo Project

How to use the costing tool

It is ideal, when using the costing tool, to work together with a small team of colleagues. Ideally the team could consist of a programmes person and someone who deals with costing and budgeting. In the case of a TSP, this could be the training facilitator, assessor, moderator and the finance officer. By working together the group can discuss issues and reach agreement on what to include, the level of effort that is required and what unit costs should be used.

Step 1:

Make a copy of the file (or workbook) from the CD onto your hard drive and give it an appropriate name.

Step 2:

Move to the worksheet with the name "Title". Here you will need to complete four sections.

- Familiarise yourself with the key to the different formats used in the tool.
- Move to the section named "cost drivers", and set the unit costs for each of the cost drivers and change the description if required. See page 43 for tips on how to do this.
- Each category of the cost driver allows you to set a specific cost driver for your own context (e.g. general other costs/event). Remember you will need to set the description, rate description and unit cost. If not needed, ignore.
- Move to the section where you are required to set the percentage, or proportion to be added, to be used to calculate the overhead or administration cost for undertaking the activities. This is generally only used by NGOs who are contracted to provide a service to a company or a Government Department.

Step 3:

Move to the worksheet with the name "Training Material Costs".

- Set the unit cost for each type of material to be included.
- Determine the quantity of the item needed per facilitator and participant.
- Ensure that the unit costs and quantities are set for each of the learning programmes.

Remember the training materials are provided in packs for each of the learning programmes. The contents of each of the packs are predetermined and not flexible. Each learner is to receive the entire contents of a training pack.

Step 4:

Move to the appropriate sheet for the learning programme you wish to cost. You can use the hyperlink provided on the "Menu" worksheet to move to the various parts of the workbook.

Start at the top of the selected worksheet and methodically work through each row to set the quantity required, and add comments (user notes) as required. As before, if not needed, ignore!

As you enter the quantity, the costs will be calculated together with sub-totals and these will be fed through to the summary sheets. In some instances (where there are no links to the "Title" page), you will need to indicate the description, quantity and the unit cost.

Repeat Step 4 for all the learning programmes to be costed.

Example of the costing tool in use

Indicates the unit cost you have set up in your cost drivers (on the "Title" page) and these have fed through to this activity

Indicates you are required to enter the quantity – of days (km) and people (vehicle). Leave blank if not relevant

Indicates you can set up your own cost description, quantity and cost. This will be specific to this step within this activity and this intervention only. It has no links to other parts of the tool

Hint! As already stated, a "User's Notes" is provided and it is good to document the decisions made as you go along, the assumptions for calculations or any changes you have made.

Step 5:

Move to the other sheets, as appropriate – "TSP" and "Coordination" and complete as required.

- "TSP" indicates all the activities required to ensure TSP capacity and competency.
- "Coordination" includes activities relating to coordination, management and MER.

Hint! You may elect to leave some activities out, or may not need all the costings provided within an activity. You can leave these blank – do not delete.

Remember to save your work as you go along!

Step 6:

Ensure that all the sheets, and all activities on each sheet, are completed to generate the overall cost of the intervention.

The sub-totals for each programme will then be generated and can be viewed on the summary sheet.

Match the total cost to the budget available – or check for reasonableness.

If necessary, review the activities and adjust the quantities or rates if the total costing is more than the available funding.

Step 7:

Move to the "Planning" worksheet.
• This sheet allows the user to consider various options for the costing undertaken. The unit cost per learner is calculated.
• Users can consider how many learning programmes can be provided with a given budget; or calculate through what budget is required if a targeted number of learning programmes are provided.
• A brief summary of the costs is provided. This can be copied and included in a proposal being developed.

Step 8:

Once the programme is initiated, the "Summary" sheet allows one to track actual expenditure against the agreed budget.

Flexibility of the costing tool

The costing tool is designed to cater for all aspects of preparing for and delivering the learning programmes, along with the necessary training and capacity development required by service providers, including administration and management, as well as coordination and MER activities.

Flexibility is built into the tool in the following way:

• Users may set the unit cost for each cost driver, along with the necessary description (Title and Costs worksheet).

- Some cost categories allow for two differentiated rates – e.g. transport reimbursement and courier costs. This allows the user to set a unit cost for two different areas/zones. For example, for travel within 100km one rate can be set and then another rate for travel of more than 100km. With the courier this would also apply – so one rate can be set for packages that are couriered within a close distance and a second rate can be set for delivery to more outlying areas.

- With each of the cost categories provided, the user may add an additional (only one) cost category – include a description and unit cost (Title and Costs worksheet).

- When costing each activity, there is a "Sundries" section which allows the user to add in other costs not currently accommodated in the costing tool (on all sheets where activities are costed).

- It is hardly likely, but should the user be required to add additional rows for other costs, it is important that this is done within the appropriate section (e.g. HR fees or General costs for meeting/training) and within the black border that marks off the section. This will allow the addition made by the user to be included in the calculated sub-total for the category carried over to the separate worksheet. It is not recommended that this be done often, as, if done incorrectly, it could lead to links built into the costing tool being broken, which could result in the miscalculation of costs.

Cautions

Guard against double costing

As you work through the tool, costing each of the activities, constantly keep the problem of double costing in the back of your mind. Do not include or repeat the costing of any aspect of an activity in two parts of the tool. This is especially important when considering learning materials. Remember the costing of all training materials is set separately and the unit cost is linked to the various learning programmes.

Avoid deleting parts of the tool

Do not be tempted to delete any aspect of the tool that you are not using. Just leave it blank. Deleting worksheets, cells or rows will affect the functionality of the tool. Instead you may elect to use the Microsoft Excel ® hide function to hide aspects of the worksheet you are not using. However the tool is protected – and you will not be able to delete or hide critical parts of the tool.

Possible error messages

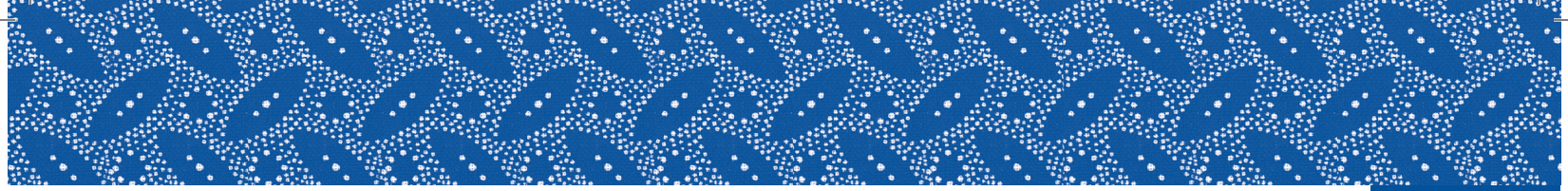As you work with the tool you may come across the following:

######	This means that the column is too narrow to show the content of the cell, and generally relates to calculations shown in Rand
Solution	Widen the column
#Ref	This means that the link to a cell referred to in a calculation has been deleted
Solution	There is no clear solution – the link will need to be reinstated. If you know which cells are required, the link can be reinstated by building the formula again, or else the formula can be copied from the master copy of the tool on the CD into the working copy reflecting the error. You can try to use the "undo" tool to trace back the steps until the link was broken.

Remember to repeatedly save
your work as you go along!

Notes