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# Unogwaja Charitable Trust Quarter One Report 2018

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# Executive Summary

The first quarter saw positive progress on Unogwaja's goals across multiple metrics. Unogwaja's mission statement, "*Building a more prosperous and equitable South Africa through partnership and support in education*" has guided our programs and processes over the past three months. Our mission helped us define who we serve, which is currently focused on building our internal Langa education program into a more robust machine. Understanding who we serve and how we serve, we have developed a few strong internal processes to help us achieve this mission. These include, but are not limited to, monthly staff meetings and weekly checkins with managers. Each meeting has a formal agenda and is structured around tasks and processes. Exciting outcomes are our social media, assessment and fundraising (draft) plans of action. The focus for the next quarter will be on the outcomes of the processes.

Our mission also guided how we approach learning and knowledge. After conducting a skills audit I identified areas of growth for each staff, purchased online courses for them and am in the preliminary stages of putting in place a professional development plan for each staff member. Further, as was the case with Shooops!, I streamlined this component by letting go the existing staff member and renegotiating storage space. The result is office, storage and classroom space with more efficiency at 82% less cost. The mission has also helped Unogwaja stabilize it's finances. While I was able to make significant cuts in the budget, this area remains a key concern.

While I believe we achieved relative success over the past quarter, tough challenges emerged. These can be summarized as financial guidance, external stakeholder influence and Trustee responsiveness. Financially, Unogwaja has raised less than a quarter of its financial goals over the past two years. In the same time period, it has hired, secured offices and extended support to it's programs. Many decisions I made this quarter were based on information I had at the time. However, external stakeholders exerted massive pressure on Challenge related decisions. In one instance I was overruled on a decision related to team selection. I learned a major lesson in this situation about leadership and believe in hindsight I should have done better to maintain our core values of Respect, Togetherness, Commitment and Inclusivity. A final challenge this quarter has been Trustee responsiveness. It has taken over two months to secure documents to open the accounts. This resulted in delays in salaries and supply payment. I believe we can do better together in this regard.

I am most excited about the future of Unogwaja, especially the Challenge in June and the challenge of being part of transforming our beautiful country into a more just place.

Sincerely,  
Warren Chalklen  
Executive Director, Unogwaja Charitable Trust

# Summary of Progress for Quarter One

In summary, I accelerated the six month deliverables in the first quarter. Below are the list of expected deliverables with progress.

## Goals and progress for quarter one:

<b>Month</b>	<b>Focus</b>	<b>Deliverables</b>	<b>Progress</b>
1-3	<i>Conduct a needs assessment of Unogwaja and Langa community</i>	<ol style="list-style-type: none"> <li><i>1. Meetings and Interviews with Board Members, staff, community members, funders, partners and other stakeholders</i></li> <li><i>2. Synthesizing and presenting the data to the community in a Community level Town Hall</i></li> <li><i>3. Facilitating a workshop that hosts diverse stakeholders where we come together to map out the vision, objectives and operational plan for the program</i></li> </ol>	<ol style="list-style-type: none"> <li><i>1. Met with 12 alumni in person, emailed with 4, interviewed 8 community members</i></li> <li><i>2. Conducted survey with 40 participants</i></li> <li><i>3. Vision, Mission and Values established.</i></li> </ol>
4-5	<i>Synthesize the input into a plan of action</i>	<ol style="list-style-type: none"> <li><i>1. Synthesize and crystallize the outcomes from the workshop and present the envisaged plan of action</i></li> <li><i>2. Receive input from board members, community members, potential funders and other stakeholders the plan of action</i></li> <li><i>3. Building on the community workshop, explore the potential for a community based board of program advisors, staff member recruitment and coalition and partner organizations</i></li> </ol>	<ol style="list-style-type: none"> <li><i>1. Draft Strategic plan executed (see below)</i></li> </ol>
6	<i>Present a 3-5 year strategic plan</i>	<i>Unoqwaja Community Trust Unoqwaja Community Trust Education and Literacy Program</i>	<ol style="list-style-type: none"> <li><i>1. Solidified team</i></li> <li><i>2. Drafted assessment</i></li> <li><i>3. Conducted preliminary assessment (in progress)</i></li> <li><i>4. Two staff are certified in Wordworks, I am enrolled for this years cohort</i></li> </ol>

## What has been achieved in quarter one?

### **Operations:**

- Vision, Mission and Values established
- Office space, classroom, storage secured for under budget
- Budget proposal sent to Trustees
- Bank accounts (in process)
- Tighter control of finances
- Met with 12 alumni in person, emailed with 4, interviewed 8 community members
- Survey with 40 respondents

### **Fundraising:**

- Secured R15,000 from RECM
- Sold R12,000 worth of socks this quarter
- Conducted 12 donor meetings
- Proposals on the table:
  - RSA Web for national Red Sock Run
  - Shield for R50,000 sponsorship for Challenge
  - Drafting proposal for Grand Challenges

### **Program:**

- Solidified team
- Drafted assessment
- Conducted preliminary assessment (in progress)
- Two staff are certified in Wordworks, I am enrolled for this years cohort

### **Challenge:**

- Nine riders
- R333,640 raised

### **Shooops:**

- Removed inefficiencies
- Orders are being processed as per usual
- Finalizing courier and automation processes
- Storage of stock moved to Langa

# Operations

## Unogwaja's Vision, Mission and Values

**Vision:**

Building a future as a community

**Mission:**

Building a more prosperous and equitable South Africa through partnership and support in education

**Values:**

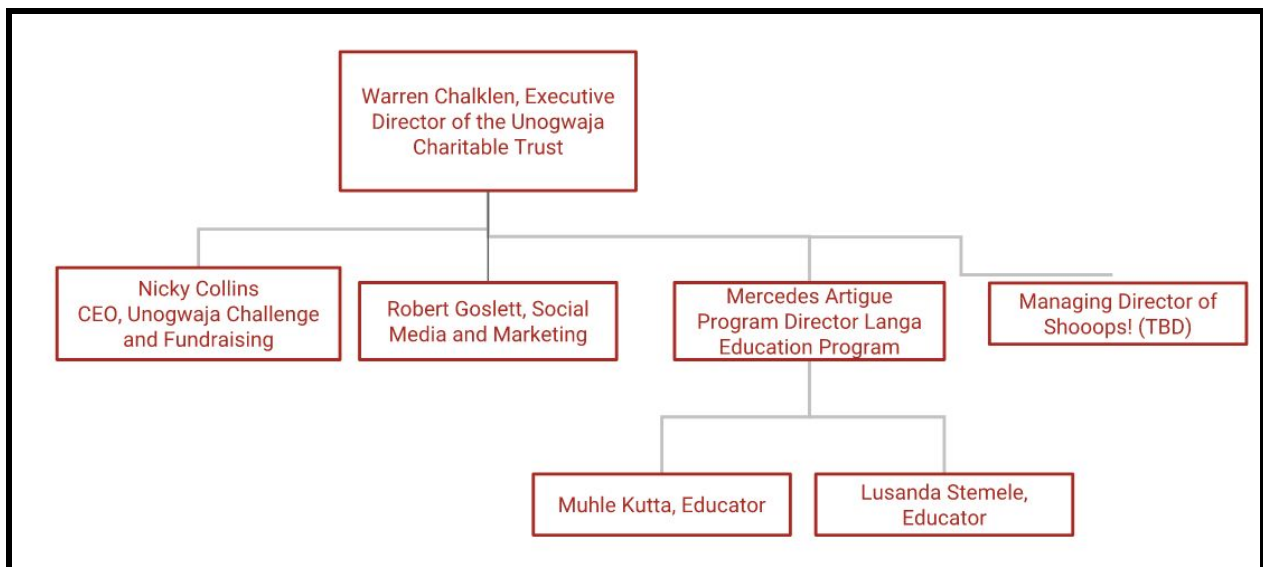
Respect

Togetherness

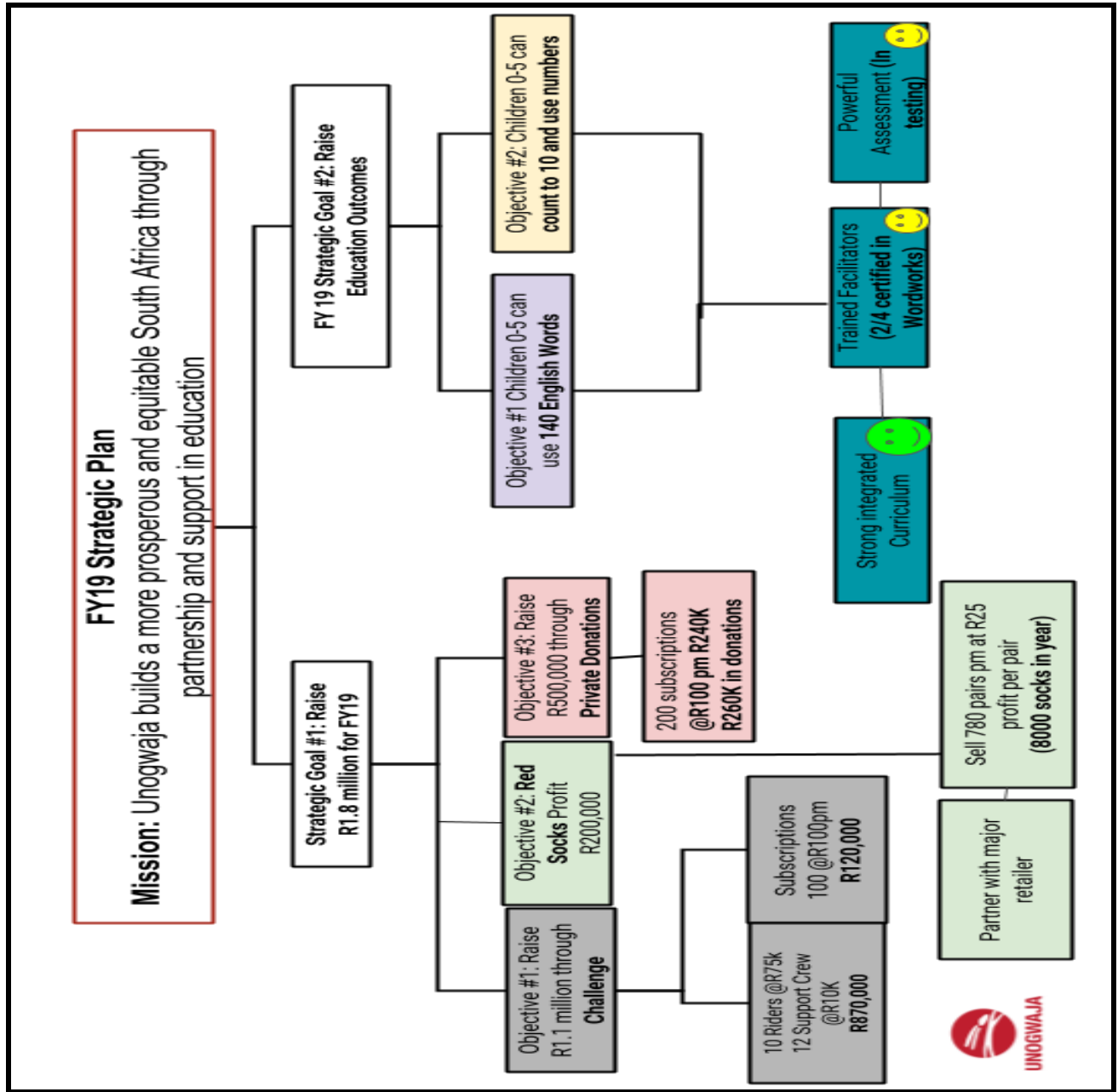
Commitment

Inclusivity

## Unogwaja Organogram



# Strategic Plan Overview



## Budgets and Bank Accounts

Below is an overview of the FY18/FY19 Budget proposal. The figures are broken down by total year and remaining quarters. For a detailed breakdown, please see addendum.

<b>UNOGWAJA Charitable Trust 2018 BUDGET PROPOSAL</b>			
		<b>FY18/FY19</b>	<b>Q2-Q4</b>
<b>Income</b>		<b>R2,598,260.26</b>	
Operations		R5,328.63	
Shooops		R43,596.00	
Fundraising		R2,549,335.63	
<b>Expenses</b>		<b>R2,431,078.66</b>	<b>R1,685,491.91</b>
Operations		R1,617,310.00	R1,067,424.60
Shooops		R75,087.46	R49,557.72
Fundraising		R338,681.20	R223,529.59
<b>Programs</b>			
Langa Education Program		R330,000.00	R274,980.00
Lebone Village		R10,000.00	R10,000.00
Umsilinga Primary		R60,000.00	R60,000.00
<b>Income - Expenses</b>			

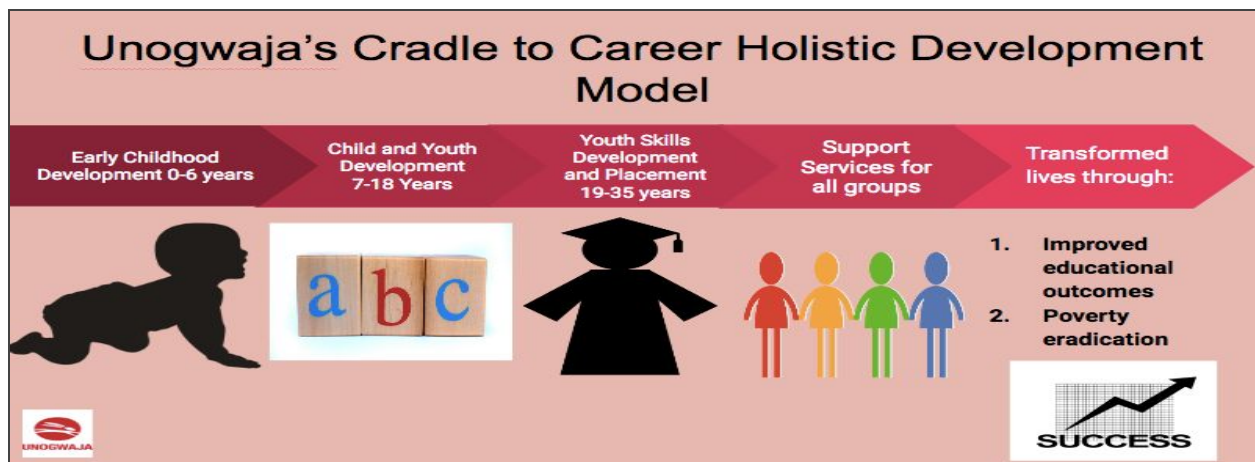
## Program

### Summary:

- a. We are focusing on building our Langa education program
- b. Previous beneficiaries will still be supported
- c. We are currently in assessment and strengthening phase



## Our Model:



## Langa Education Program

Below is a breakdown of our current offerings through the Langa Education Program.

### 1) Programs run at St Anthony's Pre-School

#### **ESL program** (English as a second language):

- \* Small group of children at a time.
- \* Lesson plans are aligned with school and grade R curriculum.
- \* Lessons are tailor made with activities and worksheets that stimulate children in various ways.

#### **Support in isiXhosa:**

- \* Selected group of children.
- \* Math and literacy support for children who are in need of extra stimulation.
- \* Lesson plans are designed to expand vocabulary, basic math skills, stimulate speaking and listening.
- \* Teamwork with teachers at the school.

#### **Caregivers workshops:**

- \* Every Word Count workshop designed by Wordworks.
- \* How to stimulate children 0-5 years old to give them a head start at school. (Early stimulation by caregivers as opposed to waiting for teachers to do so in primary school.)
- \* How to expand children's vocabulary in everyday situations, how to read to children and create a love for books, what are math concepts at that age and how to talk math, how to stimulate children through play and singing.
- \* Lesson on how to make inexpensive toys and books with recycled materials.

## **2) Programs run at the Langa Hockey and Cricket club**

### **Study sessions:**

- \* Holistic approach for the children at the club in education and sports.
- \* Support children with their school homework, projects and to prepare for tests/exams.
- \* Math tutor.

### **Fun Fridays:**

- \* Safe space to learn through interesting activities and play.
- \* Environmental program- Roots and Shoots by Jane Goodall.
- \* Board games and team building activities.
- \* Art
- \* We are introducing clubs and societies from term two.

### **New projects:**

#### **Financial talks aimed at teenagers and young adults**

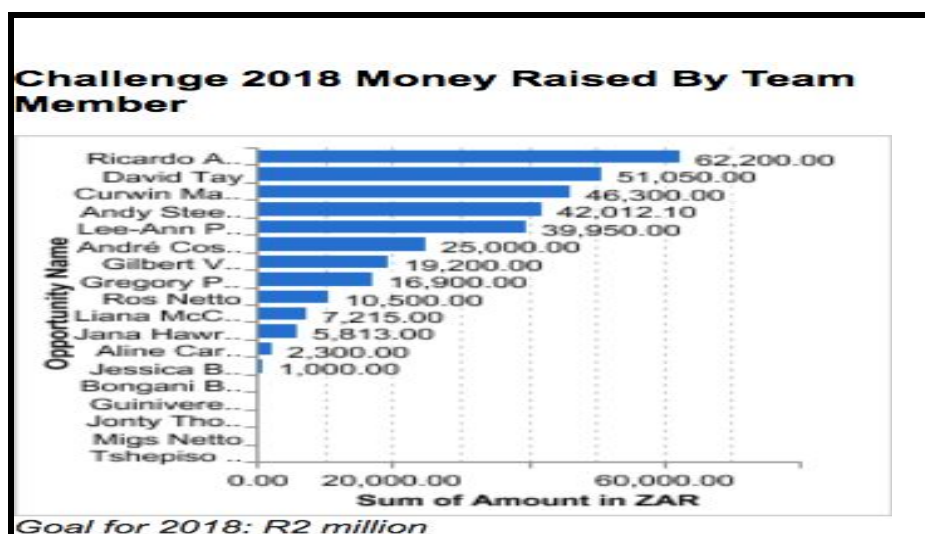
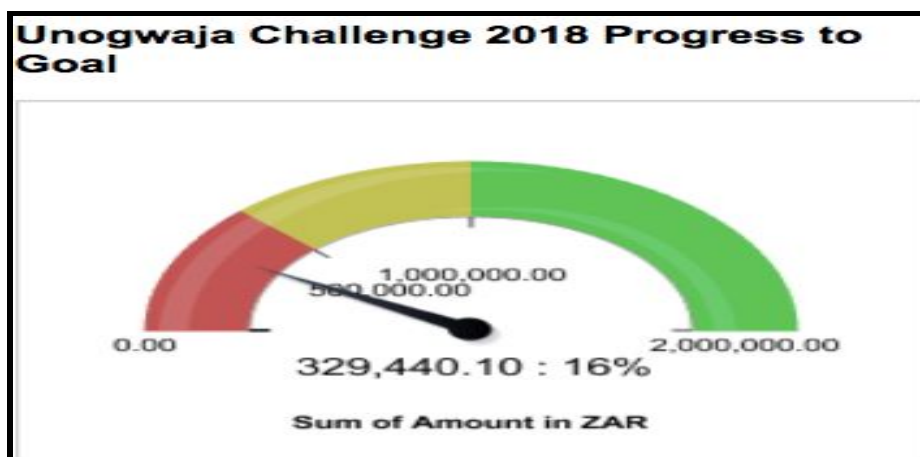
- \* Dynamic talk by Crue Invest
- \* Train young adults to give these types of talk at schools and other key places in Langa.

#### **Primary school support:**

- \* Literacy and math support for grade one and grade two.
- \* In partnership with Wordworks and the school.

# Fundraising: The Challenge and Donations

## The Challenge



Nicky's report back:

### **UNOGWAJA REPORT FOR TRUSTEE MEETING 19 APRIL**

6 weeks to go to the start of the 8 th Unogwaja Challenge on 31 May from the Southern Sun Waterfront. The pre departure plans will be the same as 2017 with a visit to our offices Langa on Wednesday 30 May, followed by the Meet and Greet at Hotel in the evening.

### **RIDER STATUS**

2018 has been an unfortunate year leading to a number of changes in the team. Since the trustee meeting on 26 January, we have seen the withdrawal of Gregory Phare (USA) due to

injury and Sizwe Ndlovu due to financial difficulties. Tshepiso Ntsime was withdrawn from the team due to a range of circumstances and encouraged to apply for 2019. The team is now a 9 person team, however morale is high and they are a committed and passionate team. I am in regular contact with each rider and mentor. Both Ros and Curwin completed Ironman on Sunday, and the other 7 are confident about their training and fitness levels. Warren and Nicky saw both Curwin and Liana in Joburg earlier this month.

## FUNDRAISING

The fundraising total is currently R356 340.

Individual Totals are as follows:

Curwin Francis: R46 300

Liana McCloghrie: R7215

Ros Netto: R10 500

Gilbert Van Zyl: R19 200

Lee-Ann Persse: R39 950

Andre Costa: R28 350

Ricardo Almeida: R62 200

David Tay: R51 050

Andy Steele: R43 512

We are working closely with the team and offering as much support as we can in order for them to reach their targets.

Liana and Ros' fundraising amounts are low due to their late inclusion in the team. We are supporting them in their fundraising efforts. Caltex EC are offering support to Gilbert and have arranged a car wash Saturday at one of their garages in Queenstown. They are also assisting him with media.

The deadline for the Red Love Train funding is 25 April. In order for them to receive C batch Comrades seeding, a minimum of R5000 must be raised, which we donate to Community Chest PMB. We are hoping to get another R20000 in through the Red Love Train before this deadline.

We are hoping to double the fundraising within the next 6 weeks, the goal is to reach R700 000 by the time we leave CT on 31 May. The fewer number of team members means less fundraisers.

## SUPPORT CREW

Miguel Netto has pulled out of the 2018 Challenge Support Crew, and will no longer be fulfilling the safety role on the road. I have been in discussions with Andrew Christie, team captain of the 2017 team about stepping into this role. He is committed and ready to take up the role if we offer it to him. He will work closely with Stoff in the lead up to the challenge, with Stoff playing a mentorship role to ensure he is ready. I believe Andrew's commitment and strong, calm character will really benefit us on the road.

With the inclusion of Andrew, we will be a team of 11 support crew members, so a total of

20 people on the road. Michele Mansor from Brazil is also no longer able to join us due to work commitments.

## GENERAL

I am confident that we are on track with all the logistics for the Challenge. We are working on resolving PMB accommodation challenges, but otherwise all accommodation is confirmed. I met with John Hall and the Community Chest team in PMB to discuss accommodation and arrival procession details. We will not be staying at BB Mdledle in Lady Frere, but return to Queens College.

The smaller team enables us to take one less vehicle, which saves us on fuel.

## BUDGET

Approval of the budget is urgent, as we are starting to incur costs. A deposit of R22 000 for the cycling kit will need to be paid within the next week.

## SPONSORS

Tsogo Sun, Caltex, VW are once again confirmed top tier sponsors. Tayla sportswear has come on board to sponsor all casual kit, since New Balance pulled out. These sponsors make a massive difference to our budget and are supported by smaller sponsors such as SPUR, Enjoy Fitness, 32Gi, Pick n Pay ect.

## 2019 CHALLENGE RECRUITMENT

It is once again apparent that we need to increase the number of applications received in order for us to replace any team members who may pull out. We already have a form on the website for interest applicants and will actively encourage applications in the lead up and during the Challenge, when interest is high. I do however believe that we need to readdress the expectations of team members, especially today where people struggle to pay R25000 and raise the required R50000.

## GOLF DAY

A charity golf day has been cancelled due to a lack of sufficient numbers.

## Donor Fundraising

Total Secured: R16,000

- RECM-R16,000

Total Prospects:

- 4 Organizations:
  - PPC
  - Hollard
  - Grand Challenges Canada

## What are our challenges and what are our solutions?

1. **Transparency:** Where has our money gone? (See pie chart) **Solution:** Budget will be posted on website going forward. Goal for 2018: Programs to be at 35% of expenditure.
2. **Unified brand:** Shooops, Unogwaja what is the difference between the two? **Solution:** Strategic plan session March 15, 2018.
3. **Funding:** Funding on downward slope: **Solution:** Implement subscription option and gather “acorn support”
4. **Alumni Relations:** Low engagement. **Solution:** Consistent, humble engagement and updates.
5. **Trustee responsiveness:** This area remains a key challenge. As an example, it has taken over two months for feedback on the budget. **Solution:** A stronger working plan of action to be formulated at the Trustee meeting.
6. **External stakeholders trying to influence internal operations:** This was a major challenge in Q1. **Solution:** I have had discussions with each stakeholder and I am prepared for similar situations going forward.

