Philanthropy of Community Instrument 2

Measuring and Valuation of Assets (PMVA)

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CONTENTS

PREFACE

This is one of several instruments which have been developed to deepen the practice of grantmakers using the lens of philanthropy of community (PoC). The PoC approach recognises the extensive and intricate networks of informal philanthropy on which all poor communities rely for their survival. The PoC approach also acknowledges that, despite their best intentions, grantmakers who have failed to recognise and work hand in hand with these informal philanthropic practices have sometimes initiated interventions which have effectively undermined and, in some cases, even destroyed these practices.

These instruments have been developed to enable you as a grantmaker to build up a thorough profile of the PoC practices in a community; to quantify their worth; and to measure the impact of external interventions on these. However, before using them, three important issues need to be considered:

1. These instruments are ineffective without a thorough understanding of the concept of PoC. Therefore, before reading further, it is essential that you familiarise yourself with this concept by consulting the CGSI's guide, *The Poor Philanthropist III: A Practice-Relevant Guide for Community Philanthropy* (available at www.gsb.uct.ac.za/clpv/poorphilanthropistIII.asp).
2. These instruments are works in progress. Working with PoC is a dramatic departure from much of conventional grantmaking practice, and it will take some years to build up solid alternative processes and instruments. The instruments presented here build on other traditions and theoretical frameworks that can contribute to our understanding of this field (Asset Based Community Development, Social Capital and Appreciative Inquiry), and they have been forged through an extensive process of consultation, theoretical debate and fieldwork with a wide range of organisations and communities. However, they are not in any way definitive, and need to be honed, refined and contextualised by you, the practitioner. In this way, we will together build a solid foundation for a PoC-based approach to practice which we believe will greatly enhance the benefits and long-term sustainability of all development interventions.
3. Before you can use this instrument to value PoC contributions, you might find it useful to develop an inventory of PoC practices in the community. We suggest therefore that you undergo the PAIM process (see www.gsb.uct.ac.za/clpv/paim.asp) before embarking on PMVA.

INTRODUCTION TO PMVA

Once you have completed the asset mapping process, PAIM, you may wish to go further and assist the community in quantifying their material and non-material contributions, and to assign them a monetary value.

PMVA provides a way to enable community associations and organisations to recognise what they contribute to development in their local community. By assigning a financial value to their contribution, communities gain confidence in their own worth. This is empowering and helps them also to speak about their contribution to social upliftment to others – including other community members, local authorities, the media as well as grantmakers and other donor agencies. By demonstrating just how much value individuals and community associations add to their community, PMVA also puts into perspective donations made by donor organisations.

PMVA is thus tremendously beneficial for the communities concerned. However, it also has much to offer development workers, NGOs and grantmakers, such as:

- A way of building a new understanding and appreciation of community giving;
- A new perspective on resources and funding relationships through the lens of PoC (it is particularly useful for organisations who wish to demonstrate their matching contribution to donors);
- A process for building confidence and deepening relationships amongst stakeholders in local communities; and
- A tool for advocacy and change management.

It is a fairly time-consuming process, but its returns are well worth the effort. In the long run, it will save the grantmaker time and money wasted on unsustainable projects which run the risk of undermining indigenous community philanthropy.

THE PROCESS

There are five basic steps involved:

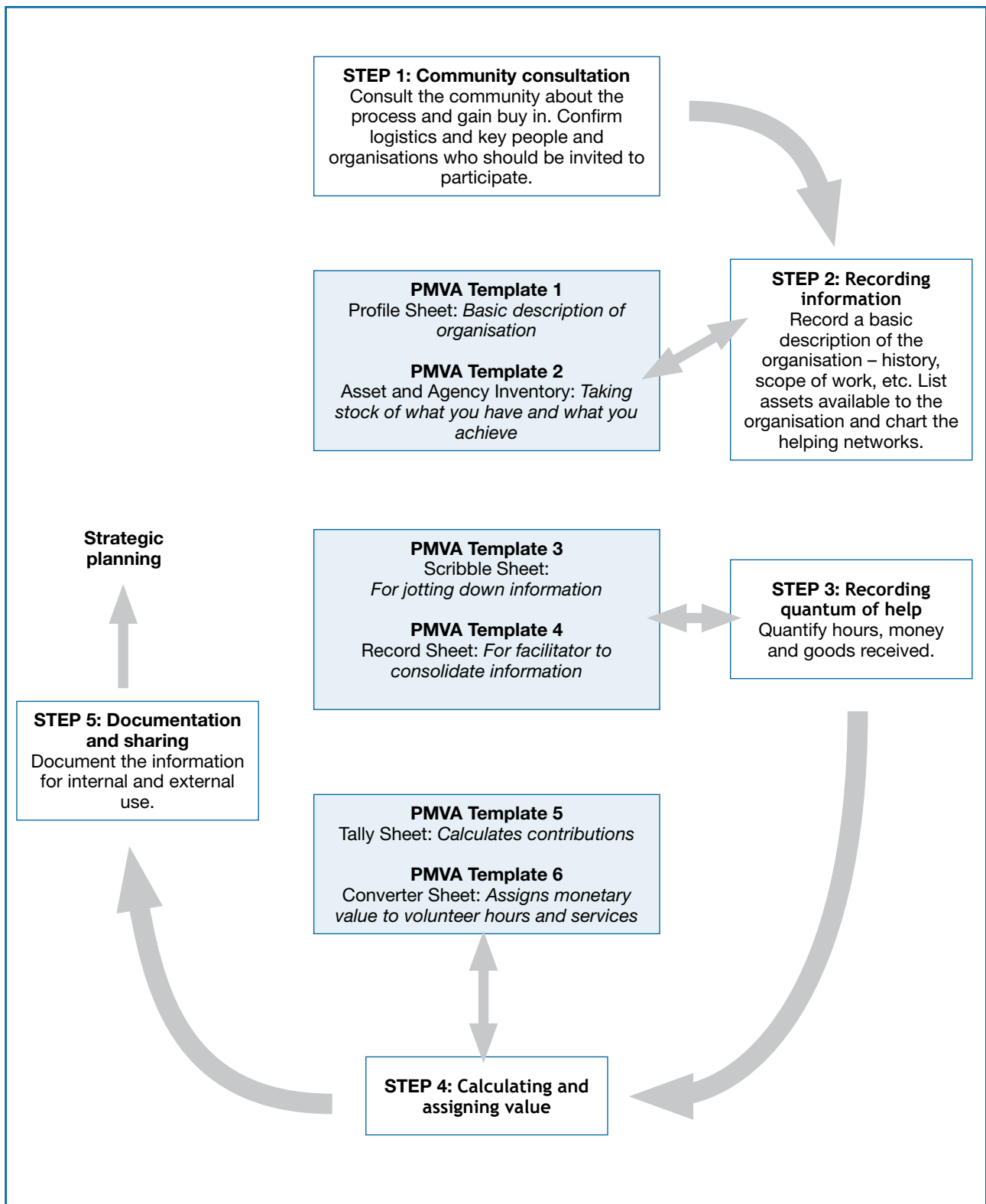**STEP 1:** Preparation and consultation
STEP 2: Recording information about the organisation
STEP 3: Recording the actual quantum of help received: Time, money and in-kind
STEP 4: Establishing the total amount of time and money given, and assigning a value
STEP 5: Documentation and use of the data

STEP 1: Community consultation
Consult the community about the process and gain buy in. Confirm logistics and key people and organisations who should be invited to participate.

STEP 2: Recording information
Record a basic description of the organisation – history, scope of work, etc. List assets available to the organisation and chart the helping networks.

PMVA Template 1
Profile Sheet: *Basic description of organisation*

PMVA Template 2
Asset and Agency Inventory: *Taking stock of what you have and what you achieve*

Strategic planning

PMVA Template 3
Scribble Sheet: *For jotting down information*

PMVA Template 4
Record Sheet: *For facilitator to consolidate information*

STEP 3: Recording quantum of help
Quantify hours, money and goods received.

STEP 5: Documentation and sharing
Document the information for internal and external use.

PMVA Template 5
Tally Sheet: *Calculates contributions*

PMVA Template 6
Converter Sheet: *Assigns monetary value to volunteer hours and services*

STEP 4: Calculating and assigning value

RESOURCES NEEDED

You will need the following instrument templates:

- **PMVA Template 1: Profile Sheet.** To record a basic description of the organisation, association or club.
- **PMVA Template 2: Asset and Agency Inventory.** This establishes an awareness and understanding of the assets that a group has as well as their ability to act and bring about change through the mobilisation of assets. A **Relationship Diagram** is developed as part of this process, and provides a picture of who works together with the organisation – individuals, other organisations, government departments.
- **PMVA Template 3: Scribble Sheet.** This provides a space for participants to quantify the monetary, time, and in-kind contributions from the community. It is particularly useful for measuring community help retrospectively.
- **PMVA Template 4: Record Sheet.** This is used by the facilitator to record from the discussion the total figure per month of money and time contributions disaggregated into key categories. This could be done monthly in real time (4A), or retrospectively (4B) for a given time frame.
- **PMVA Template 5: Tally Sheet**. This establishes the total amount of money and time/hours contributed by month as an annual figure (or alternatively by day as a monthly figure).
- **PMVA Template 6: Converter Sheet.** This establishes the financial value of the time/number of volunteer hours contributed using an hourly rate based on similar or comparable paid work at the local level.
- Large sheets of newsprint and coloured markers to produce the Relationship Diagram.
- Calculator for tallying the results.

We recommend that the templates be adapted to suit the local context.

APPLYING PMVA IN PRACTICE

STEP 1: Preparation and consultation

There are a number of issues that need to be clarified before embarking on the process, and sufficient time must be allowed for this. You need to do the following:

1. **Decide on your purpose**

   This instrument is designed primarily to assist in identifying, measuring and valuing PoC assets and to streamline agency in community organisations. However, it also helps to build motivation and confidence, thus enabling the organisation or community to engage with donors from a strengthened position. It may be conducted annually to inform fundraising purposes, or built into daily practice – thereby creating a motivating environment where effort is acknowledged and appreciated, which in turn helps to shift mindsets and energise volunteers. The data can also be used for advocacy of the organisation's work, and to encourage involvement from stakeholders. You need to consider your specific intentions carefully before embarking on the process, and to make time for planning and preparation.

2. **Introduce the concept to the organisation**

   It is very important that the community or organisation concerned fully understands why this is a useful process. Your first task is to help the target group understand the concept of PoC (see Chapter 1 of the *The Poor Philanthropist III: A Practice-Relevant Guide for Community Philanthropy* (available at www.gsb.uct.ac.za/clpv/poorphilanthropistIII.asp) – without this, they might find it difficult to identify material and non-material help offered by community members. If you are using this as a follow-up of the PAIM process, they will already grasp this.

   You then need to discuss the value of measuring and quantifying help for the participating organisation(s). Useful questions here are:

   - Do you think it could be helpful to measure and quantify local contributions to our organisations? Why? How would we use the information?
   - How does help happen in our community? Who helps our organisation? What kinds of help do we want to measure?
   - What time period do you want to look at: 3 months; 6 months; 12 months? Do you want to look at help that has happened in the past, or start measuring it in an ongoing way in the present?
   - Do you want to conduct this process in-house? Do you need an external facilitator to help? (Is it our first time to engage in such a process?)

3. **Decide whether it is to be self-administered or externally facilitated**

The process should ideally be externally facilitated if the organisation is using the instrument for the first time. Once the organisations have been guided through the process, it will be easy for them to self-administer subsequent processes.

4. **Decide on the time frame**

Depending on time constraints and the purpose for which you wish to use the information, this instrument may be used to gather information retrospectively or in real time. Obviously gathering information in real time increases the accuracy, but sometimes you may need to gather data from previous months. Once the value of this process has been demonstrated to the organisation, they can develop a system to keep records on an ongoing basis.

5. **Consult with community leaders to gain entry into the community if the inquiry is externally initiated and/or facilitated**

6. **Finalise logistics**

   - Appoint a group to lead the process.
   - Select a range of suitable informants from the organisation or community.
   - Adapt the templates to suit local needs. It may be useful to run a small pilot study to help assess the suitability of the templates and how they should be customised.
   - Ensure that you have all the necessary resources.

Once you have decided on your objectives, time frame and approach, and have decided who will do what, you can begin. The process may be conducted in one long meeting, or in shorter sessions, but ensure that you have enough time to do it thoroughly.

STEP 2: Basic description of the organisation

This step involves compiling a description of the organisation and the human and material resources available to it. This builds an awareness and understanding of the assets (including relationships) that a group has, as well as their ability to mobilise these assets and bring about change.

PMVA Template 1: The Organisation Profile Sheet

This is best completed in a workshop or meeting with at least five active members of the organisation, including some of those who are acquainted with the history and origins of the organisation. Additional information can be collected if necessary (e.g. founding members). This is usually a straightforward discussion and recording session.

Resources required
Copies of the Organisational Profile Sheet for the facilitator/recording person as well as additional copies for participants to use for reference purposes; comfortable seating and lighting arrangements; refreshments, depending on time and logistics and anticipated length of meeting; flip chart and paper if choosing to facilitate some of the discussions to arrive at consensus with a larger group.

PMVA Template 2: Asset and Agency Inventory: Taking stock of what you have and what you achieve

This looks at the assets available to the organisation – people, money, land, buildings, materials – as well as their ability to act and bring about change through mobilising them. This also involves drawing a Relationship Diagram illustrating individuals and agencies working with the organisation.

Where there are two facilitators, it is helpful if one focuses on the questions and records data around an asset and agency inventory, while the second begins to develop the Relationship Diagram during the main discussion. This saves time, and avoids the tedious repetition of information if the diagram is only developed at the end of the discussion. Another option is to actively encourage participation by providing participants with large sheets of paper and markers and asking them to draw the Relationship Diagram. You can see an example of a Relationship Diagram in the PMVA case story (www.gsb.uct.ac.za/clpv/poccasestories.asp).

Tips for this step:

- Try to ensure participation from everyone, not just the leader or founder;
- Facilitate a discussion, not just question-answer;
- Use local language/terminology wherever possible; and
- Be flexible and allow yourself to be guided (rather than be too prescriptive), and go back and add information as it surfaces.

The following questions can be used to guide the process:

- What approach will be best? What adaptations will you need to make to the templates? Who is best placed within the organisation to lead the process (if self-administered)?
- Who will you target to participate in the meeting/workshop and why?
- How will you document the information and what resources do you need?
- Are there any documents to bring or other preparations you may want the participants to make prior to the meeting?

STEP 3: Recording the quantum of help received

This information is gathered from either all organisational members, or a representative group with sufficient knowledge and experience to give reliable information. If the process is being conducted retrospectively, some information will be estimated, and may have to be checked with absent members outside of the meeting or workshop. If the process is done in real time, then participants need to be provided with the templates and be guided on how to use them to record ongoing contributions of time, money and goods in the future, over whatever time frame has been agreed upon.

This step relies upon two templates: **PMVA Template 3: The Scribble Sheet** and **PMVA Template 4: The Record Sheet**.

The Scribble Sheet may be used by individuals to jot down ideas or questions, and do calculations before giving their input.

The Record Sheet records amounts of time and money, and in-kind contributions. This template can be used in real time 4(A) or retrospectively 4(B). In real time, it is straightforward, and records ongoing contributions such as: unpaid time; goods or money contributed, or use of personal resources for organisational work; donations or funding contributions from other agencies.

Recording contributions retrospectively is done in two parts:

1. 'Normal' help: This is regular contributions of time by unpaid members, such as attending board meetings and daily or weekly administration tasks; and also regular monetary or other contributions, such as membership fees. One month's contributions can be filled in on Template 4(B) and then the result multiplied by the number of months in your specified time frame.

2. Ad hoc/once-off help: This would be recorded on Template 4(B)/2. It might include:
   – Help around specific events or days, for example, Christmas parties, World AIDS Day celebrations, harvesting, school holidays;
   – Fundraising activities: Who helped? How much was raised?;
   – Repairs and maintenance to buildings, fences, equipment, especially in response to a natural disaster during the reporting period, for example, floods or storm damage;
   – Appeals to local businesses for funds or goods, where a once-off donation was made; and
   – Advice or professional work done for free, for example, services by lawyers or accountants done for free or at a discount; a parent filling in for a teacher for no pay.

Questions to guide discussion:

- What tools and approach are we using (depending on size of group and whether real time or retrospective data are being generated)?
- Are we clear about the definition of 'unpaid' time?
- What questions should we be asking to help us to assign value to labour time in the next step?
- What resources do we need? How many copies of templates, etc.?

STEP 4: Establishing total amount of time and money, and assigning a value

This establishes the total amount of money and time/hours contributed each month as an annual figure (or alternatively per day as a monthly figure if the process is being done in real time). The information from the Record Sheet is transferred to **PMVA Template 5: The Tally Sheet**. Totals are then calculated for time, money and in-kind contributions. The labour time is assigned an hourly value on **PMVA Template 6: The Converter Sheet** – using an hourly rate equivalent to comparable paid work in the area. This value is then multiplied by the total number of hours given during the specified time frame, and a money value is therefore assigned to the time. We can now add the two monetary values together and arrive at a figure for the total value of help given. The in-kind contributions could either be described in a list or converted to a monetary value, depending on the nature of the goods.

Questions to guide discussion:

- Are their any gaps or inconsistencies in the information contained in the Record Sheet?
- Have we identified the best locally comparable paid-work rate to assign a relevant value to our unpaid time contribution?
- What data do we want to highlight according to our original intentions for doing this exercise?

STEP 5: Documentation and sharing

Once all contributions have been converted into a monetary value, this information may be used in several ways. Possible areas of analysis for an individual organisation include:

1. **Value of community help as a percentage of the total resources used by the organisation, i.e. including in-kind contributions and money from government and external donors**

   This information may be used to demonstrate to donors the comparative value of community contributions and to boost fundraising efforts by the organisation. It can also be used to give the

community a concrete understanding and appreciation of how much they have contributed. This is empowering, and may encourage the community to increase or persist in giving help. It may also encourage others to contribute.

2. Regular record-keeping to track local help given

This helps the organisation to see gaps in their administration system in keeping track of help given, thus enabling them to make their recording systems more complete.

3. The range of local skills available

This information can demonstrate to donors that the capacity commanded by the organisation is more extensive than that of staff members. It can also reveal what skills and resources are not readily available locally, which can help donors target interventions and contributions more effectively.

4. Access to material goods

This analysis can indicate whether there is an excessive reliance on local government, for example, for free or subsidised access to land and building; and can give a sense of how many assets are actually owned by the organisation or community, rather than loaned or rented.

5. Working with others: The Relationship Diagram

This demonstration of working relationships and collaboration with others gives donors a strong sense of the helping networks in the community, and the range of capacity and resources the community or organisation can command. This helps grantmakers target interventions to strengthen rather than undermine these networks.

6. Achievements and changes produced by the work of the organisation

During the process of collating and computing this data, community members will reflect on achievements and changes produced by the work of the organisation. This can help to demonstrate to grantmakers the real value of the work done by the organisation, which is often not evident in the more formal funding reports.

7. In-kind material contributions

These are difficult to quantify if recording data retrospectively, so the types of in-kind contributions could be listed and described as additional forms of local contributions without being given a monetary value. However, if recording in real time, it may be possible to quantify and evaluate in-kind inputs and add their value to the time and money values.

When analysing the data for a group of affiliated organisations, it may be helpful to also use comparative data to contextualise the measurements and values obtained. Individual organisations may also be compared to the whole. This is easier if the organisations are all from the same sector doing the same work.

In making these comparisons, it may be helpful to look not only at the comparative value of contributions for each organisation, but also for patterns of contributions in the following areas:

- Age of organisation;
- Types of service to the community, tasks performed by unpaid people;
- Number of unpaid people versus total amount of time given;
- Ownership/governance (all local people or controlled from somewhere else);
- Frequency of meetings/attendance of members;
- Access to offices, furniture and equipment;
- Number of working relationships with stakeholders;
- Presence of both paid and unpaid workers; and
- Access or not to external donor or government funds.

Presenting the information

The use of these templates generates both qualitative and quantitative information which may be used for a number of different purposes – funding reports, annual reports, advocacy work, motivating stakeholder participation and so on.

The intended purpose of the document will influence how you assemble the data, but it may be useful to generate a narrative – the story of the organisation, its history, achievements, people, etc. – as well as the numerical quantities and value of help given.

A narrative document can highlight achievements – most important sources of help, amount of money raised, etc. – depending on the intended audience for the presentation of the information. If there are a number of organisations, some similarities and differences can be highlighted.

The Relationship Diagram is a rich source of information, and provides an accessible and immediate picture of the helping networks that sustain organisations both internal and external to the community, as well as of the value brought to the community by the organisation.

Questions to guide your choices:

- How will we disseminate the outcomes and to whom?
- What reaction or response are we hoping for from outside (result linked to our initial intentions)? Is there scope for leverage?
- How do we take this forward internally? What are the next steps for our practice, systems and procedures?

PMVA TEMPLATE 1

Organisation Profile Sheet

We would like to develop a profile of your organisation/association/club. Please help us complete this information sheet as we would like to understand what your organisation does and how its works.

Section 1: Basic information		
Name/title of the organisation/association/club	**Acronym** Clarification: What is the short form or name that the organisation/association/club is known by?	**Are you registered as an NPO (non-profit organisation)?** Yes ☐ No ☐
Contact details Name and contact details of the contact person, including mailing address, telephone/fax numbers and email, if available:		
Section 2		
How long has the organisation/association/club been in existence? When were you established or set up? When did you start working? Number of years: _____ Number of months: _____		
Why did the organisation/association/club start? What is it that you wanted to do or achieve? What happened or what was going on that made you form/come together as a group?		
Is the organisation/association/club still performing this same function, or has it moved on to other things? Are you still performing the same activities and providing the same services as when you started or it is different now? Yes ☐ No ☐ How and why?		

Organisation Profile Sheet (continued)

What kind of organisation/association/club is it?

☐ Club   ☐ Community organisation

☐ Project   ☐ Church group

☐ Forum/umbrella organisation   ☐ Co-business

☐ Other, please specify:

What services does the organisation/association/club provide?
What activities are you engaged in?

Service/Activity 1:

Service/Activity 2:

Service/Activity 3:

Service/Activity 4:

Who does your organisation/association/club help?
Who gets help from you? Who do you provide your services to? Who is eligible to get help from you?

PMVA TEMPLATE 1

Organisation Profile Sheet (continued)

Where does the organisation/association/club work?
In which areas or communities do you work?

What kind of records and information does your organisation/association/club keep?
You may want to tick more than one box.

☐ Financial records   ☐ Reports to donors   ☐ Funding proposals/Business plan

☐ Meeting attendance   ☐ Membership list   ☐ Contracts with donors

☐ Membership dues   ☐ Donations received   ☐ Minutes of meetings

☐ Volunteer list   ☐ Work roster/duty list   ☐ Visitors book

☐ Available skills list

☐ Other, please specify _____

For every box that is ticked, give details of what records you keep.

Date and name of persons completing this profile

Date	Name	Office Holder	Organisation	Member	Staff	Volunteer

PMVA TEMPLATE 2

Asset and Agency Inventory: Taking stock of what you have and what you achieve

These lists will help you to take stock of the resources that your organisation/association/club has, as well as your ability to get things done. Think about five main types of resources that an organisation/association/club has:

- People: support, labour, ideas
- Skills: ability to do and know things
- Materials: things you can touch
- Finance: money
- Time: hours, days, weeks, years contributed by staff or volunteers

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1. What money/cash comes into your organisation/association/club and where does it come from?
Do members contribute fees? Do people/churches give you cash donations? Do you make money by selling goods or services? Do you get grants or funds from government, donor agencies? (You may to tick more than one box.)

☐ Membership fees   ☐ Donations

☐ Grants

☐ Other, please specify

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2. What skills are available to your organisation/association/club?
What skills, experience and knowledge does your organisation have access to? Most organisations have many skills so you may tick more than one box.

☐ Planning   ☐ Recording and minute-taking

☐ Book-keeping   ☐ Guidance, advice and ideas

☐ Organising   ☐ Fundraising

Other:

Where does this come from? Who provides it?

Asset and Agency Inventory: Taking stock of what you have and what you achieve (continued)

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3. What people are available to your organisation, association or club?

Are the people available to your organisation employees?

Yes ☐   No ☐
Are they paid or unpaid?

Paid ☐   Unpaid ☐
How many are there _____
Where do they come from?

What do they do?

Are the people available to your organisation volunteers?
Yes ☐   No ☐
Are they paid or unpaid?

Paid ☐   Unpaid ☐
How many are there _____
Where do they come from?

What do they do?

Who manages the organisation/association/club? Are there office bearers, a governing board, etc.?

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4. What access does your organisation/association/club have to material goods like buildings, equipment, vehicles or land?

These can be things you own (like a building, a computer, a wheelchair) or things you have access to and can use – (like a venue to hold meetings in, a phone or photocopier you can use that belongs to another group)

Things we own	Things we have access to and can use

How important are these forms of help (money/people/things) to your organisation's work and service? Why? Is any one of them more important than the other?

5. Does you organisation/association/club work alone or does it work with others?

Work alone ☐   Work with others ☐

If you work with others – helping each other – we would like to know more about this. Could you draw a picture of this? Start by putting your organisation/association/club in the centre of the page.Then think about all the others you work together with and draw these on your map into the space below.

Your Relationship Diagram

6. Another valuable thing that organisations/associations/clubs have is past experience.
What you have already done shows that you are able to make a difference and change things. To help think about the difference this organisation/association/club has made, what are you most proud of that this organisation/association/club has done?

What do you think has been the most important change or difference that your work has made to this community?

Another important asset an organisation/association/club has is its reputation. How is this organisation/association/club known in this community – what do people say about it?

After having thought about all these questions – and identifying all the resources that you have and how your organisation makes a difference – how would you describe your organisation?

PMVA TEMPLATE 3

Scribble Sheet

Time	Money	In-kind (items/things)

PMVA TEMPLATE 4

Record Sheet: Community help

We would like you to now focus on how people and other groups in this community use what they have (their time, talents, skills, goods and money) to help your organisation/association/club. Some organisations get support from 'outside' – from donor agencies or government projects. Others survive and operate solely on the resources that they are able to mobilise on their own and within the community. Some organisations have both.

We will ask you as a group to think about the help that your organisation/association/club has received from people in the community in the past .... months. Your task is to think about: What you received, and how much you received (the amount). For example:

1. Do you have volunteers? How many volunteers did you have that month and how many hours or days did they spend with you? Add this together to get the number of hours of volunteer time.
2. Do you receive donations, e.g. from the church? What did they give that month, e.g. money, medicine, food, clothes. And how much?

This exercise asks you to either provide information in real time or try to remember things in the past. Talking to each other about what happened may help you remember. Or maybe the organisation keeps records or a calendar that you can refer to.

Once you have talked, the facilitator will help you add up the amount of money and time that your organisation has received. She/he will also ask you about the types of in-kind contributions (goods) that you received. What were they? How much? What did they allow you to do? How important is that contribution?

The facilitator will record what you say onto a calendar. A copy of this will be given back to you and the facilitator will also keep a copy.

See PMVA Template 4 (A), 4 (B) and 4 (B)/2 on the next pages.

PMVA TEMPLATE 4 (A)

Calendar for community giving

This Template is designed for **real time** measuring

The month of_____

Time (hours)	
Management/governance meetings:	Voluntary time delivering service to community:

Money		
Membership fees:	Additional donations:	Fundraising events/activities:

In-kind (what 'things' and how much)	
Donations of goods/materials/space/venue/transport:	Loan of goods: e.g. catering, tents, desks, chairs

TEMPLATE 4 (B)

Record of community giving in an average month

This Template is designed for **retrospective** measuring

The month of_____

Unpaid time (hours)	
Management/governance meetings: Type of meeting: _____ Frequency of meeting: _____ Duration of meeting: _____ No. of unpaid participants: _____	Unpaid time delivering service to community/doing work of organisation:

Money		
Membership Fees: Amount: _____ Frequency of payment:_____ No. of people paying:_____	Regular cash donations: (Not once-off)	Regular fundraising activities: Activity:_____ Income:_____ Activity:_____ Income:_____

In-kind (what 'things' and how much)	
Donations of goods/materials/space/venue/transport:	Regular loan of goods: e.g. machines, computers, tents, desks, chairs, stove, heaters, pots, motor vehicles, etc.

PMVA TEMPLATE 4 (B)/2

Record of ad hoc/once-off or irregular help given in the past months

Unpaid time (hours): Type of meeting:_____ Frequency:_____ Duration:_____ No. of unpaid participants:_____	**Unpaid time delivering service to community/doing work of organisation:** Type of work:_____ No. of people:_____ No. of hours :_____
Money (R): Once-off cash donations	**In-kind (what 'things' and how much):** Once-off donations of goods/materials/space/venue/transport
Once-off fundraising activities: Activity:_____ Income:_____ Activity:_____ Income:_____ Activity:_____ Income:_____ Activity:_____ Income:_____	**Once-off loan of goods:** Machines, computers,tents, desks, chairs, stove, heaters, pots, motor vehicles, etc.

PMVA TEMPLATE NO 5 (A)

Tally Sheet (in real time)

Organisation's name	
Facilitator's name	
Date completed	
Comments	

Year	Time (no. of hours)	Money (no. of R)	Total
Month 1			
Month 2			
Month 3			
Month 4			
Month 5			
Month 6			
Month 7			
Month 8			
Month 9			
Month 10			
Month 11			
Month 12			
TOTAL			

PMVA TEMPLATE NO 5 (B)

Tally Sheet (retrospective)

Organisation's name	
Facilitator's name	
Date completed	
Comments	

Year	Time (no. of hours) Normal/average	Extra/ Once off	Money (no. of R)	Totals
Month 1				
Month 2				
Month 3				
Month 4				
Month 5				
Month 6				
Month 7				
Month 8				
Month 9				
Month 10				
Month 11				
Month 12				
TOTAL				

PMVA TEMPLATE 6

Converter Sheet: Turning hours into monetary value

Example

In HIV/AIDS home-based care projects in South Africa, volunteers are paid a stipend of (ZA) R1 000 per month (on government programmes attached to the local clinics). These volunteers work for 4 hours per day, 5 days per week, which equals 20 hours per week. This comes to roughly 80 hours per month.

R1 000 divided by 80 hours = R12.50 per hour.

This would be a realistic value to attach to volunteers doing similar unpaid home-based care work.

What is paid for similar work in the local area: ....

Type of work/Organisation(s): ....

Remuneration received: ....

How often are you paid: Hourly.................. Daily................... Weekly................. Monthly.................

Days worked per week or month (Total): ....

Hours worked per day (Total): ....

Total hours worked for remuneration period: ....

Calculation

Total payment received: ....

Divided by total number of hours worked: ....

Equals hourly rate: ....

Multiply the total unpaid hours as per Tally Sheet on Template 5 by the hourly rate to arrive at a (ZA) Rand value for the community.