



Tool 6

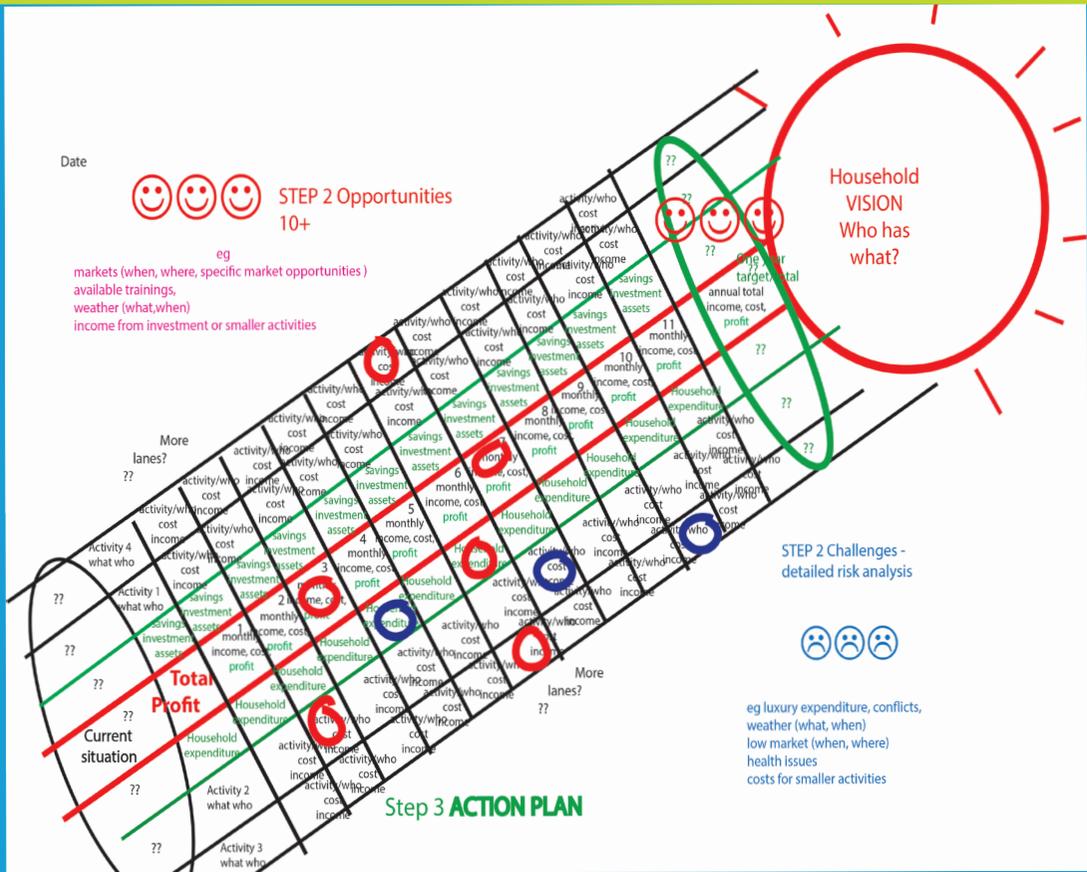
LIVELIHOOD MANAGEMENT CALENDAR

Steps and Workshop Facilitation

Participatory
Action
Learning for
Sustainability

Toolkit for
 GYEM Ethiopia

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 with
 GYEM staff
 and champions



Introduction

The Livelihood Management Calendar (LMC) is a strategic planning tool to enable household members to work together, make productive investments and improve their individual and joint incomes, savings and assets.

It goes beyond a simple activity calendar to incorporate gender analysis, production, incomes, savings and investment targets.



The Livelihood Management Calendar is based on the same principles and basic steps as the Vision Journey learned at the beginning of PALS.

The LMC produces a monthwise breakdown of the work and other inputs, expected outputs and reinvestment that can then be tracked in order to truly understand how a household livelihood will work. It is like a standard cash flow analysis, but is more useful because it keeps your vision clear before you, includes consideration of relationships within your family that can help or hinder you, and ideas on how to make the best of opportunities and avoid risks.

Livelihood Management Calendars form the basis for discussions on business strategy between people involved in the same activities to identify where collaboration of various types would be useful. For example helping each other with activities, investing in new activities in slack seasons and saving after harvest to reduce the need for loans.

The LMC should include all activities you and/or other household members are involved in. Where livelihoods or specific economic activities are very complex and/or household members have very separate activities that they themselves control, it may be best to start with management calendars for individual activities/businesses or for each household members, following the same principles and steps as those below. Then aggregate these into an overall Household Livelihood Management Calendar.

The LMC can be further extended to include loan repayment as a financial management calendar (FMC) as part of financial education or Financial Action Learning System methodology (FALS). It can also provide the overview framework for outputs like cash flow charts from other business trainings. For further adaptations see <http://www.gamechangenetwork.org>.



Aims

The Livelihood Management Calendar builds on:

- analysis of opportunities and challenges in Tool 2: Vision Journey.
- analysis of work and expenditures in the Tool 4 Happy Family Tree, particularly the analysis of gender and generational balance: who does what, who gets what and who owns what.
- assessment of production, markets and household relations from Tool 5 Income Challenge Action Tree.

It can also incorporate and build on existing accounting and business planning tools done as part of other trainings.

For individual farmers

- review the household vision from individual vision journeys of household members
- develop seasonal and annual profit targets for each main activity
- start to think about balance between food crops, household expenditure and commercial activities
- identify remaining months where there is less work and other activities could be taken on
- identify months where there is more profit that can be used for investment to maximise savings and productive investment
- identify months where there is income shortage or particular expenditures like school fees or production inputs and how these can be covered through savings and cross-subsidy rather than debt
- look at the possibilities of saving for productive assets like land purchase or investment in new businesses
- continue the analysis of gender balance of contributions and benefits, particularly in terms of control of incomes and responsibility for household food security and expenditures
- develop advanced planning, analytical and drawing skills that can be applied to other issues, including planning new businesses.



For organisations

- increase understanding of household livelihood systems and relative roles of women and men
- examine interrelations/potential conflicts in terms of land and labour usage between crops for food security, cash crops and income earning activities in order to highlight implications for agricultural and business support programmes.
- increase understanding of these potential tensions around use of land and labour, and possibilities for improvements in equality of gender division of labour and ownership
- identify whether advanced business training might be appropriate, for whom and of what type and for what activities.
- form the basis for possible further work on specific value chains and/or local economic development and/or gender mainstreaming and advocacy.

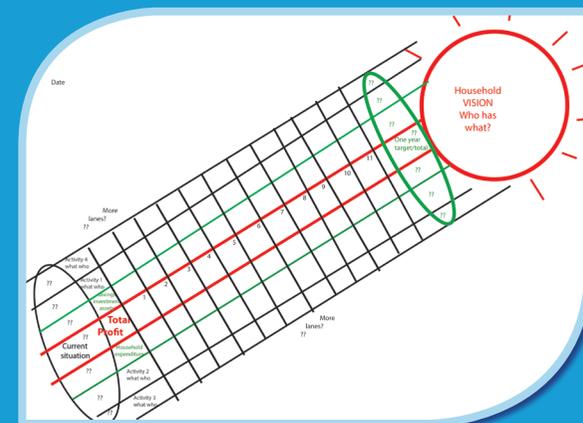
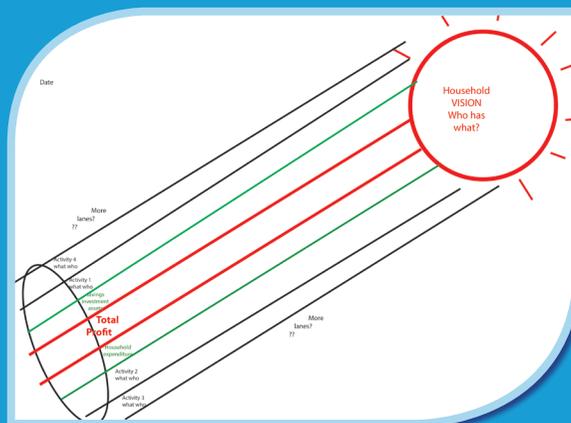
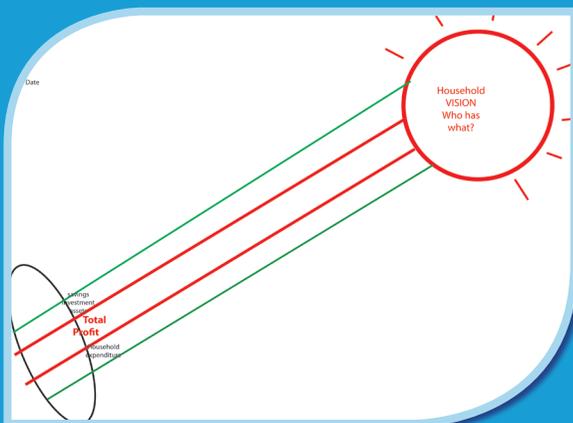
Steps

This Livelihood Management Calendar is drafted on the next double page after your previous tool.

Once you have a good draft transfer it to a flipchart to fill in more detail - and show off to your neighbours!

Remember to put the date in the top left hand corner.

If participants cannot write numbers refer to the sheet on pictorial number system. These people should sit together in one group and progress as fast as they can, but focus on number and arithmetic skills.



1 Vision and Central Framework

What is the household vision that benefits all household members and inspire them to work together?

- Draw the Journey Framework - vision circle red top left
- Central Lane vision 'spine' with two red lines for total profit calculation (income minus costs)
- Draw one green line on top for planned savings, investment and asset purchase
- Draw one green line below for necessary household expenditure (food, school fees, health etc)

This completes the backbones of the calendar that keep it strong.

2 Activities Multilane Framework

- What are the different activities of all household members that should be included.
- Which are the main activities that need a lane for themselves - crops grown in sequence on the same land are in the same lane. Draw a black line to make a lane for each activity. In the respective lane of the current circle put a symbol for the activity and a symbol for the family member/s doing the work - you can indicate share of work by size of the symbol. You may choose to put all the household activities below the red spine, and individual ones above, or household ones around the spine and individual ones on the outside.
- Which minor activities might be growth activities with their own lane? Add further lanes at top and bottom for these.

3 Calendar Framework with target

Draw 12 vertical lines across the road and number these by month in the central profit lane.

The last space should be the green target circle.

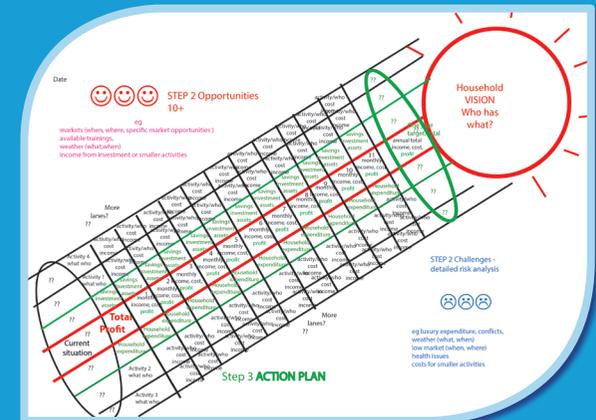
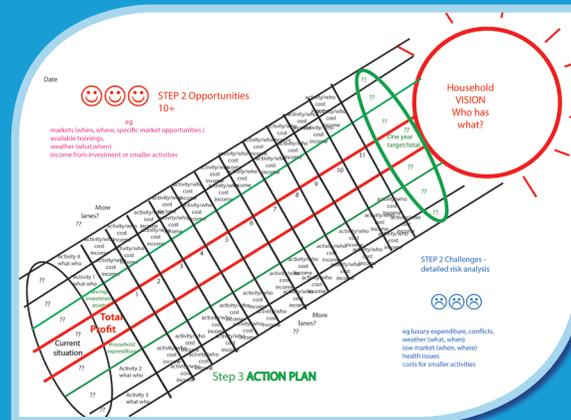
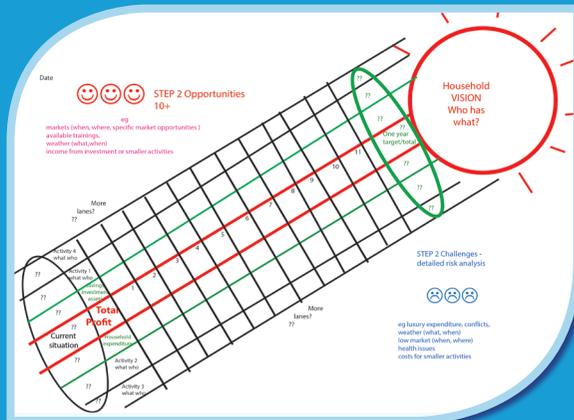
In the current circle put your last year's profit (income minus costs) in black for each activity. You may need to calculate on a separate paper and/or consult family members. If you do not know exact profit put the estimated income, and subtract your estimate of costs. And put a question mark after the figure.

In the target circle put a provisional estimate in pencil - you will confirm in green for the plan once the rest of the calculation is done.

NOTES

Particularly if time is short, or if participants need things to be simple to begin with, the framework for this could just be for one activity that is important for that participant. The rest they fill in at home with their family.

If the focus on gender and generational empowerment is to be maintained it is important to ultimately include other household members. Even if the starting point has to be simple for people who cannot read and write. Otherwise the tool becomes just an individual plan that will not necessarily reduce inequalities.



4 Opportunities and Challenges

Now as with the first Vision Journey identify at least 10 opportunities - put these above the road by the appropriate month.

Brainstorm also about possible income earning activities that can complement the main activities. Particularly activities that give a short-term return to make money for reinvestment and/or fill in spare time.

Then do a thorough risk analysis. Identify luxury expenditures that consume income and can be cut. Also climatic and disease risks at particular times of the year that need to be planned for. Potential household issues and conflicts.

Then look again at opportunities and see how challenges can be overcome.

5 Activities who does what? income and costs?

Now fill in the activities along each lane. Do this first in pencil as you may need to adjust.

Who does what in each month - what things are done by women and what is done by men. Check again on the symbol you put at the beginning of the lane. Does anyone actually do more or less than you thought, does the symbol need to be adjusted?

What are the costs for each activity in each month?

What are the incomes in each month?

Who is controlling the money? Is this the person doing most of the work? Keep this in mind for Step 7 below.

6 Calculating the backbone plan

Now in the central profit lane calculate total income and put the figure at the top of the lane by adding up all the numbers. At the bottom of the cell put the total costs. Put all these in pencil.

If some activities are for wife only or husband only you can put these separately as they have implications for Step 7.

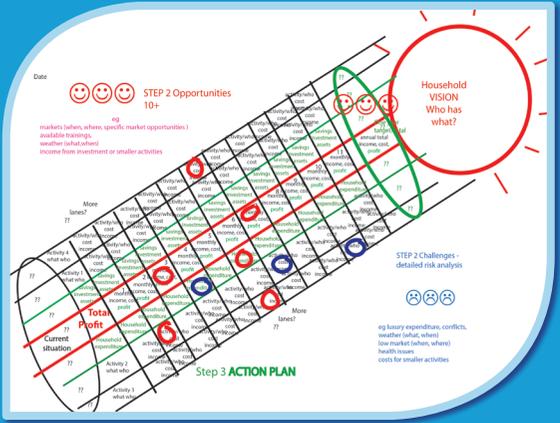
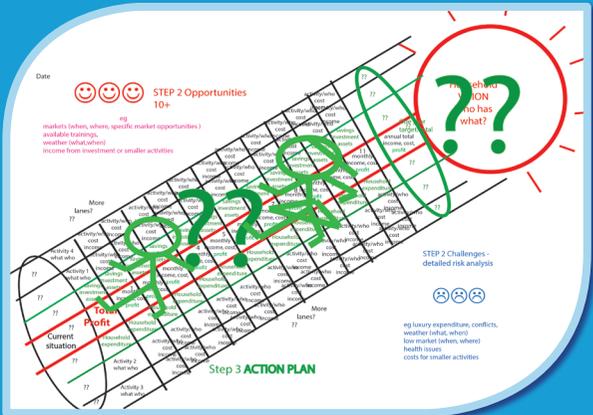
Then in green in the central profit lane subtract the total costs from everyone from the total incomes from everyone to calculate the total anticipated monthly profit for the household.

This is available cash that people can share and divide for household expenditure, savings and investment. Put your plan for these in green in the relevant lane - making sure that you will have enough savings in rich months to invest in poor months.

NOTES

The gender and generational analysis is extremely important for both men and women.

In particular to see the levels of imbalance - perceived and actual. Although it is important to avoid stereotypes, in most contexts it is likely that a priority will be to see what income earning activities can be developed for women and youth. And how investment in productive assets for them can be made from 'men's' income (to which women in particular generally contribute substantially through unpaid work in that activity or in household work).



7 Household Balance check

Now look carefully at each activity. Compare the calculations on work, income and expenditure for different household members from your Happy Family Tree.

- Are there any things that you think are unfair? Is anyone doing more work than the others? In this calculation include time spent on unpaid household work.
- Is anyone getting less income in relation to their work input?
- Can the profits be used for investment to address this situation?
- Revisit your Happy Family Tree and add any new green change action fruits that can help to balance things.
- Add any extra lanes for new activities that can help balance things.

8 Continually track, review and adjust

When you get to each month, you need to compare what was planned and what actually happens, adjusting the following months accordingly.

- Things achieved should be ringed as red fruits.
- Things that are not possible at all are ringed in black as withered fruits.
- Things postponed as green fruits.

Monitoring

The drawing of the Liveliness Management Calendar follows the generic PALS colour coding:

- The inspiring vision is drawn in red.
- The current situation and activity lanes are in black.
- The plan - the target, savings/investment and household expenditure for family wellbeing and happiness - are drawn in green. They are currently 'unripe'.
- Things planned but not achieved are either ringed in blue as 'perished fruits' if they cannot be remedied, or carried forward to another month in green.
- Opportunities and challenges are also reviewed and ringed or added to.

The aim is to make very visible the progress and achievements through the amount of red replacing the green. And for farmers to progressively learn to make and implement realisable plans with their families. So that everyone's income and wellbeing increases towards the vision.

All the individual achievements, and also learning on opportunities and challenges, should be discussed within families and groups to share and improve strategies. They can also be quantified on group Vision Journeys.

Facilitation overview

This tool will take all of Days 3 and 4 of a 5-day livelihood strengthening workshop. Including sharing of strategies and number system.

When used for peer sharing, the champion:

- explains the purpose of the tool

- goes through the steps at the back of their notebook (by this time they are designing their own steps)

The person learning:

- fills in the plan

- ideally transfers to a flipchart

- says who they will share with

Finally they can compare and share ideas and see how they can work together.

Participant preparation

- Come on time bringing Notebook Diaries, pencil and coloured pens and all previous flipcharts and work from any other business trainings
- Think about the different activities of women and men that will be included

Facilitator preparation

- Familiarise yourself with the tool
- Prepare an introductory explanation
- Put a blank flipchart on the front wall for interactive presentation
- Plan how groups will be composed - is there a need for a group of people who do not know their numbers? another for advanced women and men? should the other groups be divided by marital status? by main activity? or self-selected? The main aim is to maximise progress and also the sharing between participants with similar visions
- Seat yourself to the side, not at the front

Materials/ prepared inputs

- Notebook diaries with coloured pens.
- A blank flipchart for the front of the room and coloured markers placed for people to come up and draw.
- One flipchart with 4 coloured markers per participant (markers to be taken back at the end, flipchart to stay with participant)

Timing 2x days of 6 hours Each day 2 x 3 hour sessions or more with homework

Day 1 morning

- Group formation as decided and agreed with participants by main activity (women and men are mixed) (15 minutes)

Rest of the day

- Interactive presentation and drawing of the Livelihood Management Calendar in notebook diaries. The facilitator goes slowly through the steps with participants drawing on the blank flipchart while everyone else draws in their notebook diaries. Includes assistance with calculations on calculator, and number system.

Day 2 morning

- Group sharing and further refinement of individual plans in activity groups, identification of opportunities and challenges and possible areas for collaboration (30 minutes - 1 hour)

Day 2 afternoon

- Sharing and discussion 'cafe'. One group stays with their drawings while the others circulate to find out more about the drawings that interest them most. Then they swap with a new group staying with their drawings.
- Clarification recap of tool for peer sharing. Pairwise design of pictorial manual, shared and agreed within each group (1 hour)

Outputs

- Individual Livelihood Management Calendars for the next 12 months on a flipchart that can be put on the kitchen wall or other wall in the house for continual reference and sharing with family and neighbours. These are then tracked over time. Group listing of opportunities and challenges as basis for identification of further training needs/collaboration
- Tool steps in diaries as designed by the champions.

Homework for participants

- To complete their LMC, building on the inputs from others
- To share what they have learned with at least 2 people before the next meeting
- To track progress over the coming year

Homework for facilitator

- Document the information on gender issues, opportunities, challenges, areas for collaboration and organisational follow up
- Photograph the flipcharts with brief notes
- Consider implications of observations on participants and process for the following activities.

Pictorial Number System

The ultimate aim is that all participants in PALS should be able to use national number systems for recording quantitative information. However, it is also possible that at some stage a number system will need to be developed to enable people with no formal education to record numbers on their diagrams, particularly this LMC.

In many cases people who cannot read and write are better at mental arithmetic than people who can read, because they have to be able to calculate so they are not cheated. However people who have little contact with markets, or generally lack confidence may need some support.

The pictorial system developed with champions in Ethiopia is based on the principles of an abacus counting machine. It makes arithmetic, particularly adding and subtraction on diagrams much easier and quicker – particularly people who have not spent years learning mental arithmetic and who do not have a calculator.

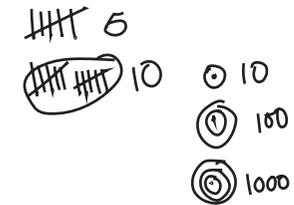
It is important that PALS facilitators, and also other stakeholders in the same process, are able to use both systems in order to facilitate an inclusive process.

The basic number system developed so far is shown on top right.

- Bundles of 5 are counted: '1,2,3,4,5 bundle'
- Two bundles of 5 are ringed as 10. 10 is also shown in short for bigger numbers as a dot with a circle round
- Then progressive factors of 10 add another circle around - the number of circles being equal to the number of zeros in the Arabic system.

In the photograph below, vegetables can also be ringed to indicate 10 or a hundred kilos or Birr.

But this number system will need to be reviewed with the champions to see what innovations they have made in practise to make their everyday calculations and recording as easy and quick as possible. Experience in Uganda has shown that simplifications are needed by the champions once their incomes increase to thousands and millions. But they themselves can do this in ways most practicable for them. This needs then to be recorded for replication elsewhere so that people with little or no formal education can be included in business trainings.



Date



STEP 2 Opportunities 10+

eg

- markets (when, where, specific market opportunities)
- available trainings,
- weather (what,when)
- income from investment or smaller activities

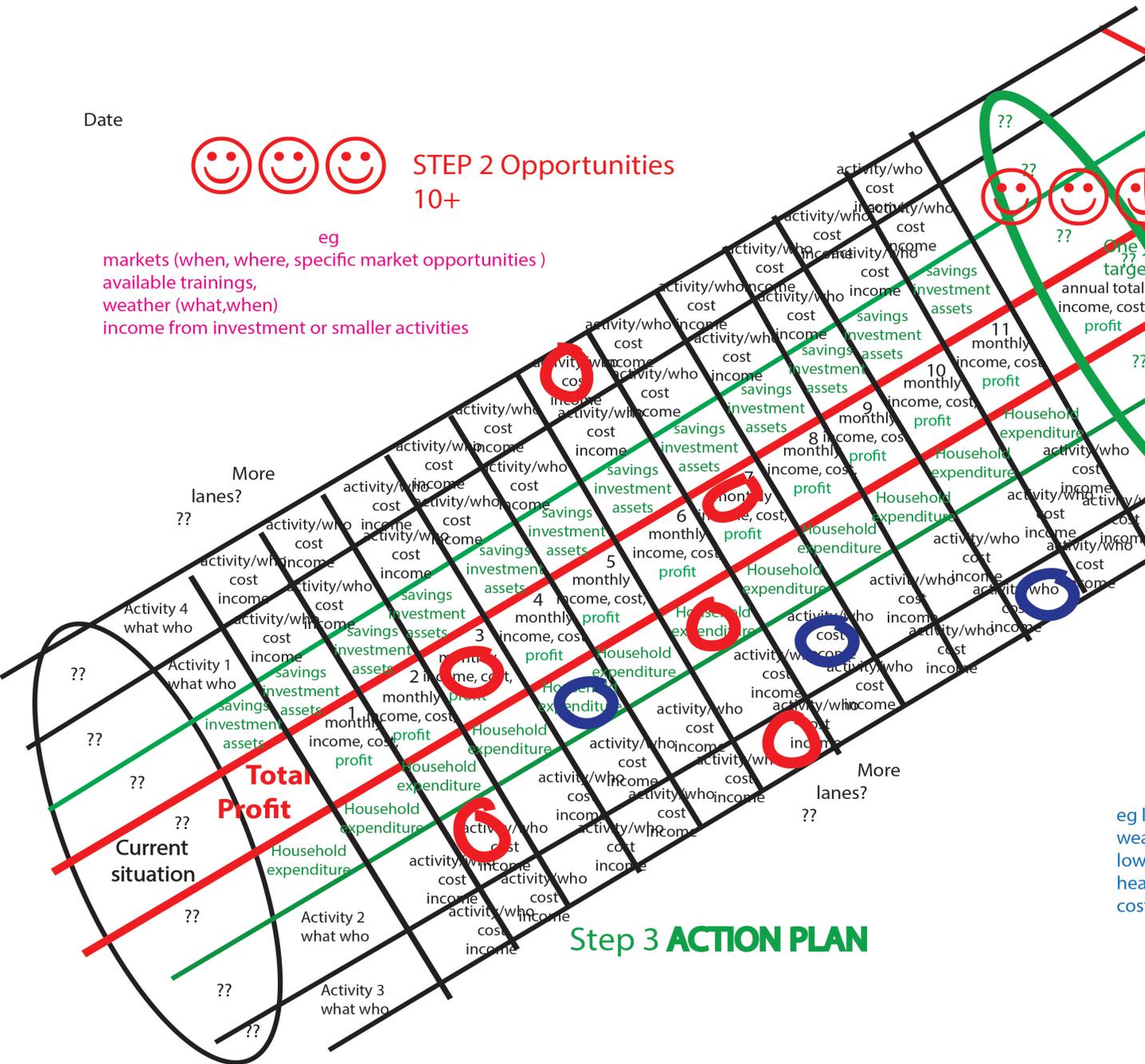
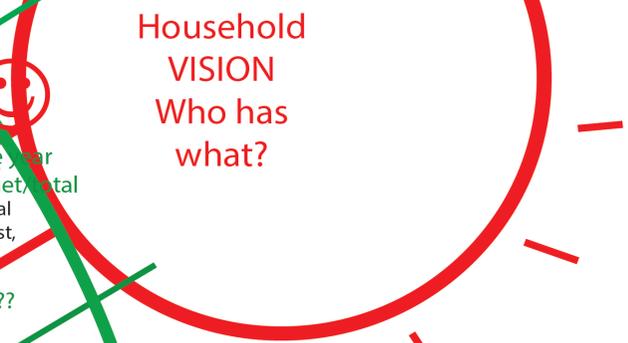


One year target

STEP 2 Challenges - detailed risk analysis



- eg luxury expenditure, conflicts,
- weather (what, when)
- low market (when, where)
- health issues
- costs for smaller activities



Total Profit

Current situation

Step 3 ACTION PLAN

