MATCOM

■ BASIC TRAINING METHODOLOGY
material for training of co-operative trainers

TRAINER'S MANUAL

international labour office, geneva
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by Roald Gustafsson

MATCOM
**Material and techniques for cooperatives management
training**

The MATCOM Project was launched in 1978 by the
International Labour Office, with the financial support of
Sweden. In its third phase (1984-1986) MATCOM is financed
by Denmark, Finland and Norway.

In collaboration with cooperative organizations and
training institutes in all regions of the world, MATCOM
designs and produces material for the training of managers
of cooperatives and assists in the preparation of adapted
versions for use in various countries. MATCOM also provides
support for improving the methodology of cooperative
training and for the training of trainers.

PREFACE

The ILO-MATCOM Project has designed a number of "training packages" for the training of co-operative managers in developing countries. This package has a different target group: the <u>trainers</u> who are working in co-operative colleges and other training centres.

Many co-operative trainers are recruited "from the field" with considerable experience and a solid knowledge of co-operation and business management. But for co-operative trainers this is not enough. To work effectively in a training centre they must also know the proper techniques of course design, they must have knowledge of learning principles and they must know the most effective methods of management training.

This manual provides an outline for a short course on "training methodology". The course is designed especially for new trainers in the co-operative sector as an introduction to their important work and to help them discover some of the keys to successful training.

MATCOM collaborates with co-operative organisations and training institutes in developing countries for the improvement of management training. For more information on joint training activities, please write to:

        The ILO-MATCOM Project
        c/o CO-OP Branch
        International Labour Office
        CH-1211 Geneva 22
        Switzerland.

THE TRAINING PROGRAMME

1. **The target group**.

   The course described in this manual is intended for persons who need basic training for their work as trainers/teachers in co-operative colleges and other training centres; they may already be working in such positions, or intend to do so in the future.

   To benefit from the course, participants should have a thorough knowledge of co-operation and of the subjects in which they are specialised (e.g. general management, co-operative law, communications, accounting, etc.) but they need not have previous training in "education" or similar subjects.

2. **Aim**.

   The aim of the course is to give participants a basic knowledge of the principles and methods used in designing and implementing training programmes for co-operative leaders and managers.

   In particular, the course should improve participants' abilities:

   - to organise and contribute effectively in curriculum development work, including training needs analysis, specification of training objectives and design of training schemes;

   - to design effective training sessions based on the most appropriate training methods, aids and materials;

   - to conduct such training sessions;

   - to evaluate the results of training.

3. **The course leader**.

   The person in charge of the course should be a trained

and qualified teacher with experience from a Co-operative college or similar institution.

4.   The course manual.

This manual is intended for use by the course leader only (the participants in the course should not have the manual).

The manual describes how the course may be conducted, session by session. (See para.8.) Each 'session guide' begins with information about objectives, duration and material needed.   Handouts for the participants are included (white sheets) and can be reproduced as needed.

5.   Structure and contents of the course.

The course is divided into six TOPICS, and each topic is covered by a number of SESSIONS (altogether 31 see the outline on page XI). This should be seen as a 'model outline' or suggestion, which has to be adjusted to fit the actual needs of the participants. Topics and sessions may be added or deleted as required and more or less time can be allocated for any part of the programme, time for practical exercises can be increased, etc.

The following matters should be given particular attention:

-   Topic 2 deals with curriculum development. It provides necessary background and introduction to the topics that follow but can, nonetheless, be 'conden sed' into two or three sessions if more time is needed for training methods.

-   On the other hand, Topic 2 can also be extended with an additional case study (see Session 2.4 Items 11-18), or even used as a basis for a special 'Curriculum Development Workshop', if the purpose is to actually prepare a curriculum rather than

study the work procedures.

- The time for 'lecture assignments' can be increased
  as desired, ((see Session 3.9). Suggestions for
  supplementary exercises (additional practice) are
  included in several other sessions.

6. <u>Duration</u>.

To conduct the programme as suggested in this manual
and utilising all material provided, would take approxi-
mately 70 hours (12-15 days). When adjustments to the
outline and to individual sessions have been consider-
ed, the actual time required can be calculated. The
forms provided (pages IX-X) may be useful.

7. <u>Planning the course - a practical approach</u>.

The course leader has to do the following:

a) study the contents of this manual;

b) identify the qualifications of the participants and
    make a tentative training needs analysis;

c) prepare a tentative course outline on the basis of
    this manual but adjusted to the needs of the parti-
    cipants;

d) get participants' views on the proposed course out-
    line and make adjustments as appropriate;

e) prepare the final programme.

It is, of course, necessary to do most of these prepara-
tions before the course starts. While minor adjustment
may be made 'at the last minute' Steps d and e may be
carried out in Session 1.2 (see the Session Guide,
Point 16).

8. <u>Training approach and methods</u>.

Throughout the course a variety of training methods are
used. The intention is, of course, to take every oppor-

tunity to familiarise participants with different
methods. Thus, they will learn about a particular train-
ing method not only through a special 'demonstration',
but also experience it as trainees in real training
situations during the course.

Most sessions are based on contributions from partici-
pants. The course leader's main role is to elicit these
contributions through tactical questioning and by lead-
ing discussions.

Naturally, an experienced course leader will not agree
with the approach suggested in all the sessions; many
possibilities are open to a creative teacher and it is
important that the course leader chooses the methods he
prefers and believes to be the best. Furthermore, many
issues and problems which are not mentioned in the man-
ual will probably need attention during the course; it
will therefore not be possible to strictly follow the
session guides. This is not the intention, anyway. The
manual should be looked upon as a source of ideas
rather than a definite lesson plan.

9. Facilities, material, equipment.

The classroom should be arranged for discussions, not
for lecturing. In other words, participants should sit
in such a way that they can see each other's faces with-
out restricting their view to the board and screen.

A chalkboard and a flip chart are needed for most
sessions. An overhead projector (ohp) with accessories
is necessary for Session 3.8 and would also be useful
in many other sessions. Video equipment is useful in
the lecture assignments (see Session 3.9).

A copier is needed to reproduce the 'handouts' intended
for the participants; the originals are supplied in
this manual (the white sheets).

The course leader will find additional examples of

training methods in the material published by MATCOM, which has been provided to all co-operative training organisations in the developing countries. It may be useful to have a complete set at hand.

10. <u>After the course</u>.

In connection with an appraisal interview some months after the course the training managers (or the course leader) should (in addition to any other topics) discuss the following points with participants:

a) How did the course affect your attitudes to your work as a trainer? Do you appreciate your responsibilities and do you enjoy your work now more (or less) than before the course?

b) What further training would you need to develop your talents and your skills as a trainer?

Time planning

The time indicated below is the number of hours required if the course follows the outline in this manual. Fill in the time required for your adjusted programme.

Topic/session	Proposed	Adjusted
1 INTRODUCTION		
1.1 Opening	1	_____
1.2 To be a Trainer	1.5-2	_____
2 CURRICULUM DEVELOPMENT		
2.1 The Job	1.5-2	_____
2.2 The Trainee	1	_____
2.3 The Training Needs	2-2.5	_____
2.4 The Training Scheme	1	_____
2.5 The Objectives	1-1.5	_____
2.6 In-Service Programmes	2-2.5	_____
2.7 Presenting the Courses	0.5-1	_____
3 METHODOLOGY - THE BASICS		
3.1 The Methods	1	_____
3.2 Lecturing	2	_____
3.3 Basic Learning Principles	1.5-2	_____
3.4 Motivation and Sequencing	0.5-1	_____
3.5 Using Questions and Discussions	1	_____
3.6 Creating Variation	1	_____
3.7 Visual Support	1	_____
3.8 The Overhead Projector	1.5	_____
-Supplementary exercise	(2)	_____
3.9 Lecture Assignments	8	_____

THE TRAINING PROGRAMME - LIST OF SESSIONS

introduction

SESSION 1.1

OPENING

Objective: To demonstrate the importance of effective
staff and management training in the co-opera-
tive movement; to ensure that all participants
are aware of the purpose of this course; to in-
troduce participants to one another; to identi-
fy sources of expertise within the group and
to ensure that all administrative details are
in order.

Time: 1 hour.

Material: Pre-course questionnaires to be completed by
the participants at the start of the session.
List of participants.

Session Guide

1)   The formal opening should be brief. The following is
a possible outline for an opening speech.

-      A co-operative enterprise must be efficient and
competitive if it is going to have any influence
on economic and social development.

-      But an enterprise is only as good as the people
working in it.

-      Therefore, a co-operative enterprise must have
professional staff and management.

-      To achieve that, a co-operative must pay atten-
tion to several matters: recruitment, staff poli-
cy, remuneration, and development of human resour-
ces (education and training).

-      An organisation and a system for education and
training is necessary, but that is not enough.

-      A training centre, like an enterprise, is only as

good as the people working there. If the training is ineffective, the only result is a waste of money.

- Therefore, a co-operative training centre must have professional staff and leaders, competent in the fields of both co-operative management and training.

2) To illustrate the objectives and the contents of the course, confront participants with a number of questions like the following, and explain that the course will deal with problems of this type.

- Do we teach the right things to our trainees – things they really need to know?

- Will they be able to apply in their jobs what they learn in our training centre?

- Do we use the right methods – so that they understand, learn and remember?

- Are we using the time economically so that trainees learn effectively what they need to learn in the shortest possible time?

- Do we create the best possible 'learning climate' in our training centres?

3) Tell participants that the contents of the course (and the timetable) will be discussed in detail during the following session.

4) Ask each participant to introduce himself or herself and to summarise his or her previous training and experience. Refer to the pre-course questionnaire, if necessary. Identify the special expertise each participant brings to the course, emphasising the point that the group as a whole is a very valuable resource.

5) Explain that the experiences of the participants will

be utilised during the course through their contri-
butions to it and that a great deal of the time will
be used for discussions and practical exercises.

6)   Ensure that any administrative problems are dealt
with: matters of accommodation, transport, and any
other points of information should be settled now.

BASIC TRAINING METHODOLOGY - Pre-course Questionnaire

Name:_____

Job Title:_____

Employed by:_____

Working place:_____

Brief description of your responsibilities:

_____

_____

_____

Which subjects are you competent to teach?

_____

_____

Education/training -
- in co-operation, management, economics, etc. (state name
of courses, organiser, duration, exams, when):

_____

_____

_____

- in education and training methodology (state name of courses, organiser, duration, when):

_____

_____

What practical experience have you had in co-operative management?

_____

_____

For how long have you been teaching co-operative management?

_____years.

What do you enjoy most in your work?

_____

_____

What do you find most difficult in your work?

_____

_____

What is the reason for you to attend this course?

_____

_____

_____

SESSION 1.2

TO BE A TRAINER

Objective: To enable participants to identify all the
              tasks involved in the whole process of plan-
              ning and designing a training programme, and
              to present the programme and timetable for
              this course.

Time: 1 1/2 - 2 hours.

Material: Handouts:
              'The systems approach to curriculum develop-
              ment and course design' (also as a poster).
              Timetable.
              Session evaluation sheet (from ILO: TTMM).

Session Guide

1)   Refer to the opening session when participants intro-
      duced themselves. Point out that they have different
      backgrounds and experiences in the training profes
      sion as well as different ideas about their jobs. Sug-
      gest a brief discussion to get participants' views on
      what they like and dislike in their jobs, how they
      spend their time, and so on. (The discussion will
      also function as an 'icebreaker' and warming-up exer-
      cise.) Encourage everyone's participation by asking
      questions such as:

      -    What do you find interesting in your work?

      -    What is the most time-consuming task of a train-
           er?

      -    What is the most difficult job?

      -    How has your attitude to the job changed since
           you started as a trainer?

      -    What would you like to change in the training

centre to make your job easier?

2) Whenever a participant mentions a particular 'job' or
    a 'task' carried out by a trainer (during this dis-
    cussion) write it on the chalkboard without comment
    or explanation. After a while, point out that the dis-
    cussion has clearly shown that a trainer's job is com-
    plex and diverse. Suggest that the list on the chalk-
    board should be made complete to show <u>all</u> the jobs
    that have to be done in a training centre.

3) Ask participants to mention every possible task that
    comes to their mind, and add all their suggestions to
    the list. To ensure that no important tasks are for
    gotten, ask participants to assume that they will be
    responsible for the planning and implementation of a
    management training programme; they should, for in-
    stance, think about a new course for shop managers
    which has never before been conducted in their col-
    lege so they will have to start preparations for the
    course from 'scratch'.

4) A completed list should include most of the items lis-
    ted in the left side column of the following table.
    If not, elicit them through hints and questions. For
    easy reference the items here are arranged in a logi-
    cal order, but they should be listed in <u>random order</u>
    on the chalkboard during the exercise. Do not take
    time to discuss the suggestions, but ask participants
    for clarification when necessary so that all under-
    stand the meaning of the suggested tasks - as briefly
    explained in the right hand column.

<u>TASKS</u>	<u>WHAT IT MEANS</u>
- JOB ANALYSIS	To examine the job of a ma-nager, in order to identify all the tasks or duties.

-      TRAINEE ANALYSIS   To examine the educational
                            background and qualifica-
                            tions of the trainees.

-      TRAINING NEEDS   To determine the training
       ANALYSIS   subjects and topics and to
                            identify   the contents   of
                            the required subjects.

-      SETTING TRAINING   To specify the results to
       OBJECTIVES   be achieved in each course,
                            and   in   each subject and
                            each topic.

-      DESIGN OF TRAINING   To plan the learning activ
       SESSIONS   ities to take place in the
                            classroom.

       Analysis of session
       contents.
       Sequencing.
       Choice of training
       methods.
       Preparation of
       session plans.
       Preparation of train-
       ing material.

-      IMPLEMENTATION   To conduct the course.

-      EVALUATION   To examine the results of
                            the training.

-      ADMINISTRATIVE TASKS

       Obtaining funds.
       Information/invitation to applicants.

       Selection of participants.

Arranging accommodation, etc.

Allocating trainers.

5) Refer to the list on the chalkboard and to the introductory discussion about the role of a trainer; emphasise that a trainer's tasks and responsibilities are more extensive than most people, including some trainers, usually believe.

6) Point out that there are two types of tasks listed on the chalkboard; ask participants to identify them.

   a) Some tasks are purely 'administrative', they can be carried out in collaboration with the administrative staff of the training centre.

   b) Other tasks are 'training tasks' which must be carried out by the academic staff.

7) Explain that we will, in this course, deal only with the tasks directly related to the design and conduct of the training programmes.

   Ask participants to identify all the administrative tasks and delete them from the chalkboard.

8) Go through the tasks now remaining on the chalkboard; ensure that all participants understand their meaning. It is likely that many items are overlapping or listed under different terms; ask participants to suggest how the list could be 'edited'.

   Use the table under point 4 as a guide, and elicit suggestions from participants in order to delete, add or group items so that only the following items remain on the chalkboard at the end, but still in random order:

   - Design of training sessions
   - Trainee analysis
   - Job analysis

- Implementation
- Training needs analysis
- Evaluation
- Setting training objectives

9)   Ask participants whether it is necessary to carry out the preparations for a training programme in any particular order; which task must be done first, second, etc.?

Ask participants to discuss this question for a few minutes with the colleagues sitting next to them. Instruct them not to move from their places but just to turn their chairs and in this way form small groups of two, three or four persons, and to discuss in a low voice.

10)   Interrupt the discussion after about five minutes. Tell the participants that the classroom sounded like a beehive when they were discussing, and that this form of group work is therefore called 'beehive discussion' by trainers. (This discussion method will be demonstrated further later on in the course.) Ask one group to tell in what order they would perform the different tasks and note it on the chalkboard. Ask the other groups for different suggestions, and note also these, if any. A possible suggestion:

1 Job analysis
2 Trainee analysis
3 Training needs analysis
4 Setting objectives
5 Design of training sessions
6 Implementation
7 Evaluation

11)   Show this systematic approach (the seven points suggestion you just put forward) in the form of a flight of steps. This should be drawn in advance on a large

sheet of paper. Display it as a poster in the class-
room for the entire duration of the course, and ask
participants to copy it or distribute it as a hand-
out.

THE SYSTEMS APPROACH
TO CURRICULUM DEVELOPMENT
AND COURSE DESIGN

```
                                                    7
                                                 EVALUATION
                                          6
                                      IMPLEMENTATION
                               5
                            SESSION
                            DESIGN
                       4
                    SETTING
                    OBJECTIVES
               3
          TRAINING NEEDS
            ANALYSIS
       2
    TRAINEE
    ANALYSIS
  1
 JOB
ANALYSIS
```
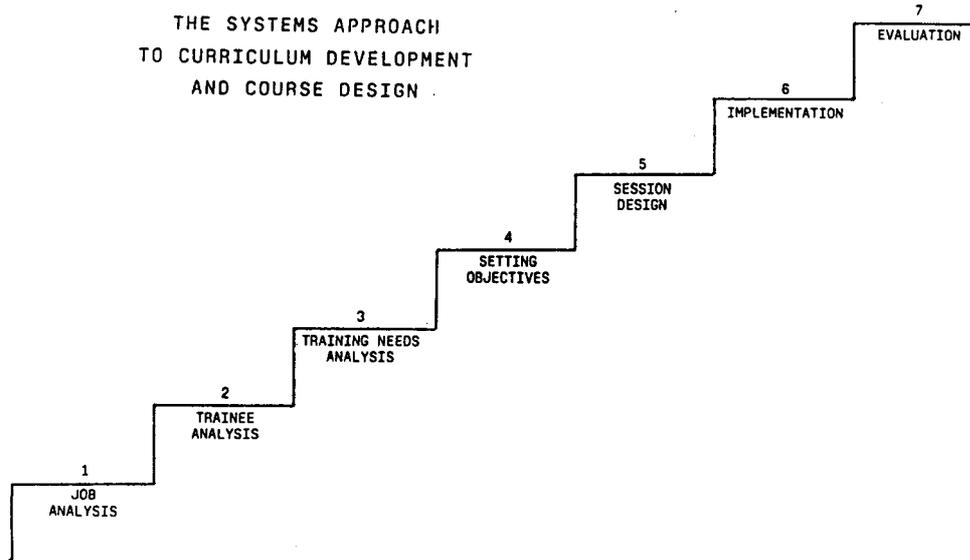
12) Discuss participants' questions and comments regard-
ing their suggestions for the various tasks and when
they should be performed. Stress that we should not
look upon the different steps as isolated activities
to be performed individually. In our practical work
we will' find that they are all more or less inter-
related. Demonstrate this with the help of the follow-
ing model (here the first three steps in the model
have been combined into one 'training needs analy-
sis'):

Needs Assessment — Objective Setting — Program Design — Implementation — Evaluation

The Training Model
as an integrated process.
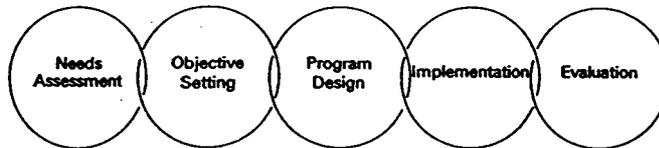
Needs Assessment Process — Evaluation Process — Objective Setting Process — Implementation Process — Design Process
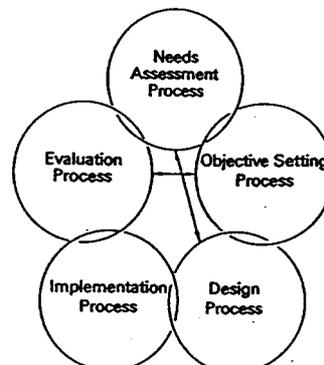
(Use the originals provided in Session 3.8/T14a,b
to make ohp transparencies of these charts.)

13)   Although the aspects of integration are important,
       the obvious logic in the step-by-step approach should
       nonetheless be emphasised. Elicit in the discussion
       the following basic arguments.

       -    We cannot design the training sessions until we
            know what we want to achieve (the objectives).

       -    We cannot set the objectives until we know the
            training needs.

       -    We cannot identify the training needs until we
            know the actual job requirements and trainees'
            present qualifications.

14)   Participants may appreciate the need for such a 'sys-
       tematic approach' in their work. Point out that they
       themselves probably practise it already, although
       they may not be aware of the 'system' in the approach
       and not used to the terminology. Prove this by trans-
       lating your 7-step suggestion into simple language:

       -    first we have to find out <u>what</u> we should teach
            (Steps 1 to 4);

       -    then we decide <u>how</u> to teach it (Step 5);

       -    then we <u>teach</u> it (Step 6), and finally

       -    we <u>check</u> if they learned it (Step 7).

       (The transparency T.14c in Session 3.8 may be used to
       give another example of the terminology used in the
       training world. Ask participants to translate the
       terms into common language.)

15)   Tell participants that the 'systems' approach which
       they have now discussed will also form the outline
       for the programme of this course. All the steps will
       be discussed, more or less, depending on partici-
       pants' needs and wishes.

16)   Discuss and agree on a programme and timetable for

the course. Depending on the circumstances various approaches can be used:

<u>Alternative A:</u>

The course leader has prepared in advance a detailed timetable and presents this as a proposal. After discussions and possible adjustments the programme will then be fixed. (This approach is suitable for a formal, full-time course.)

<u>Alternative B:</u>

The course leader presents a list of possible subjects to study during the course, plus his assessment of the time needed. The proposal is discussed, subjects are selected for inclusion on the programme and a timetable worked out by the whole group. (This approach may be suitable for a less formal part-time course or similar arrangement which gives sufficient time for the course leader to finalise preparations for the following sessions.)

The course leader should, in any case, prepare himself by studying the time allocations suggested in this manual, and by taking a survey among the participants prior to the first session (see the Introduction, para.7).

17)   Ask some of the participants, with reference to the discussions about the course programme, how they would like to formulate the aim of the course. Compare and discuss their suggestions, and agree on the wording, e.g.:

- the aim of the course is to enable participants to prepare relevant curricula for the training of co-operative staff and managers, and to use effective training methods when conducting such programmes.

18)   Inform participants about the working methods of the
       course: discussions, demonstrations and practical
       exercises will be the main activities, lecturing will
       be reduced to a minimum. Refer to the introductory
       session which revealed that the group as a whole has
       a considerable experience in various fields of work
       and training subjects. Everyone will therefore be
       urged to contribute, and everyone will have a chance
       of sharing experiences and of learning from others.

19)   Ask one participant to sum up what has been done dur-
       ing this first working session of the course:

       -    we have been introduced to the 'systems approach'
            for curriculum development and course design;

       -    we have learned some basic terminology in the
            field of training;

       -    we have agreed on the objective and programme for
            the course.

20)   Distribute copies of the session evaluation sheet.
       Ask participants to fill in one for this session. Ex-
       plain thoroughly how they should indicate with an X
       on each scale where their opinions lie.

       Note:

       Use the same form for all following sessions for
       which you want an evaluation.

THE SYSTEMS APPROACH

TO CURRICULUM DEVELOPMENT

AND COURSE DESIGN

1
JOB
ANALYSIS

2
TRAINEE
ANALYSIS

3
TRAINING NEEDS
ANALYSIS

4
SETTING
OBJECTIVES

5
SESSION
DESIGN

6
IMPLEMENTATION

7
EVALUATION

SESSION EVALUATION

Session No. and Title: _____

1   ENJOYMENT OF SESSION

Did not enjoy
it very much   [_____+_____]   Enjoyed it
very much

2   LEARNING

I knew it
before   [_____+_____]   I learned
a lot

3   CONTENT

Oversim-
plified   [_____+_____]   Too compli-
cated

4   METHOD OF INSTRUCTION

Not
suitable   [_____+_____]   Fully appro-
priate

5   PARTICIPANTS' INVOLVEMENT

Too little   [_____+_____]   Too much

6   TIME ALLOTTED

Too little   [_____+_____]   Too much

SESSION EVALUATION

Session No. and Title: _____

1   ENJOYMENT OF SESSION

Did not enjoy
it very much   [_____+_____]   Enjoyed it
very much

2   LEARNING

I knew it
before   [_____+_____]   I learned
a lot

3   CONTENT

Oversim-
plified   [_____+_____]   Too compli-
cated

4   METHOD OF INSTRUCTION

Not
suitable   [_____+_____]   Fully appro-
priate

5   PARTICIPANTS' INVOLVEMENT

Too little   [_____+_____]   Too much

6   TIME ALLOTTED

Too little   [_____+_____]   Too much

curriculum development

SESSION 2.1

THE JOB

Objective: To enable participants to explain the importan-
               ce of a job analysis as a basis for a job-
               oriented curriculum, and to identify common
               problems in organising curriculum development
               work.

Time: 12 - 2 hours.

Material: Handouts:
               'Training needs?'
               'Job description - an example.'
               'Extract from a job specification'.

Session Guide:

1)   Refer to the model for the 'systems approach to cour-
       se design' prepared in the previous session and now
       posted in the classroom. Ask one participant to re
       view the model and briefly describe the work involved
       in each 'step'. Point out, again, that we cannot con-
       duct a course without a curriculum (i.e. a 'plan',
       stating the contents and objectives of the course),
       and that the first four steps in the model are concer-
       ned with curriculum work. Explain that we will use
       this session to identify some of the main difficul-
       ties in developing a curriculum.

2)   Stress the importance of having the 'right' curricu-
       lum. Obviously, if we teach the 'wrong' subjects and
       miss the needed ones the course will not help train-
       ees to perform better on their jobs.

       Remind participants about the example used in the
       first session, the design of a training programme for
       shop managers. Ask them to think about the curriculum

show how many 'votes' each topic received.

5)   Ask participants to interpret and explain the com-
     piled results. It should be evident from the results
     that:

     -   if the task had been an easy one, most partici-
         pants would have selected the same topics;

     -   if the participants have spread their votes over
         many more than eight topics it indicates that they
         do not agree and that it is not so easy to deter-
         mine what shop managers need to learn.

     Try to identify two lists which are very different
     and have only a few topics in common. Show them to
     the participants and explain: 'This illustrates the
     problems and the importance of curriculum work. If I
     am admitted to this course I will study these topics
     (read from one list), and if I am admitted to this
     course I will study other topics (read from the other
     list), - two courses with the same objective but with
     very different contents. How can I know which course
     is best' for me ?' (The 'correct' selection will be
     discussed later.)

6)   Participants may rightly suggest that their selec-
     tions would have been in concordance if it had been a
     realistic situation, and if they had more time. Point
     out that a training needs analysis nevertheless is a
     very difficult task and that mistakes are common. Ask
     participants to suggest possible reasons for this;
     the following should be mentioned and discussed, the
     underlined words written on the chalkboard for added
     emphasis:

     -   We simply do not know enough about the job and res-
         ponsibilities of our trainees. (e.g. we do not rea-
         lise the importance of having a suitable selection
         of goods in a shop, and so we fail to include the

for such a course; would they have any problems in selecting the training topics to be included on the curriculum?

Someone may suggest that <u>all</u> subjects related to re- tail management should be included, therefore this is not a problem. Ask if they would be sure to make the best selection if resources allowed for a short course only. Warn them that the task may be more difficult than they envisage, and repeat again that the curriculum is crucial for the effectivity of the trainig course.

3) Suggest an experiment: tell the participants that they will be given a list of topics all which may be useful in the training of shop managers. They should select only eight of these topics to be included in a course, (the eight topics they consider to be most crucial for successful operations). To make the exer- cise as realistic as possible, give some further back- ground details, e.g.

- the trainees all have secondary education (Form 2) but no formal training for work in the distribu- tive sector;

- before this course they all have about two years experience as shop supervisors;

- the course will be of two weeks duration;

- there will be a 'continuation course' after about one year.

Distribute the list 'Training needs?' and allow about ten minutes for the participants, individually, to se- lect the eight topics.

4) Compile the results of the exercise; the easiest method may be to write the numbers 1 to 38 on the chalkboard and let the participants tick off their selections against the numbers. This will quickly

topic 'stock policy' in the courses.)

- We are not sure whether a task should be trained in the <u>classroom or on-the-job</u>. (e.g. the topic 'hygiene' is of extreme importance in the food distribution trades, but is it necessary to train it in the classroom?)

- We include <u>theoretical</u> topics instead of <u>job-oriented</u>, useful topics. (e.g. we teach 'motives of buying' before we teach the basics of 'salesperson's behaviour'.)

- We emphasise <u>control</u> rather than <u>service</u>. (e.g. we spend many hours on 'stock control systems' but too little on how to avoid out-of-stock situations.)

- We include <u>irrelevant</u> topics. (e.g. we train everybody in 'marketing', even if all marketing is done by a Marketing Board.)

- We include some topics for '<u>traditional</u>' reasons. (e.g. 'Co-operative Law' is included as a separate topic although it could be taught as integrated parts of other topics. "But we have always had 'Co-operative Law' on the timetable...".)

- We mix up '<u>needs</u>' and '<u>wants</u>'. (e. g. 'sales promotion' may be given to much time because the trainer is particularly interested in that topic.)

- We select training topics on the basis of our <u>intuition</u>, not on the basis of an objective training needs analysis. (e.g. "they are always poor at arithmetic", and so we include the topic without really knowing if it is needed.)

7) Tell trainees that we will continue to discuss these problems from a practical point of view. How can we make sure that our curriculum will be based on real training needs?

8) The first 'practical' question to discuss is <u>who</u> is competent to work out a curriculum. Ask participants

for   suggestions   and discuss the competence of the
following persons:

- The 'training manager'. (A college principal, for
  instance, may have good knowledge and contacts with
  all   parts   of   the co-operative movement, and he
  knows what his teachers can achieve. Does he also
  know enough about co-operative management?)

- A teacher/trainer in the co-operative college. (He
  may know the subject-matters very well, but may
  lack practical experience of co-operative manage
  ment. His suggestions may be very 'academic', based
  on university text-books only.)

- A co-operative officer from the Apex organisation
  or the Ministry of Co-operatives. (He may have seen
  a lot of the problems 'in the field' but have
  little experience of training problems.)

- An experienced co-operative manager. (He may know
  his job very well, but may have formed a poor opi-
  nion about institutional training.)

- A 'new' co-operative manager. (He is still learning
  and may be able to tell what he missed during his
  training courses.)

- A subject-matter expert. (We may find a teacher, an
  auditor or a manager who is an expert on a particu-
  lar subject.

9)   Elicit the conclusion that none of the suggested per-
     sons, alone, will be able to design a reliable curricu-
     lum, but they will form a highly qualified group for
     this task if they work as a team. For this reason it
     pays a training manager anxious to have the best possi-
     ble curriculum to organise an 'advisory group' for
     curriculum development.

10) Refer again to the handout 'Training needs?', the par-
     ticipants may want to have the 'correct' answer – the

optimal selection of training topics for a basic
course. Tell them that the list has been scrutinised
by experienced shop managers and advisory groups, and
most of them consider the following topics to be most
crucial:

- Topics No: 13, 14, 11, 24, 28, 20, 1, 7, 9, 15.

- Stress that this is in any case just a 'typical'
  and 'average' selection; a realistic 'training
  needs analysis' in a particular situation (and for
  a particular course) might result in a different
  list of topics.

11) Having discussed the question of <u>who</u> should be enga-
    ged in the preparation of the curriculum, the next
    question is <u>how</u> it should be done.

    Refer participants to the first step in the systems
    approach, the 'job analysis', and ensure that every-
    one appreciates what it means in practice: to examine
    the job of a manager and to identify all his tasks.
    (The term 'job' is used here to mean an occupation
    which takes in all the different duties or 'tasks'
    such as planning, budgeting, staffing, organising
    transport, marketing, etc.)

12) Tell participants that the result of a job analysis
    is usually a document which, more or less, provides
    detailed descriptions of the manager's tasks. Distrib
    ute the sample job description. Discuss what a job
    description is used for and elicit the following:

    - it guides the job-holder in carrying out his du-
      ties;

    - it gives information about the job to prospective
      applicants and, at the same time clarifies the
      division of responsibilities, and the organisation
      of the enterprise;

    - it facilitates our analysis of training needs.

13) Discuss the usefulness of the job description for some-
     one in charge of curriculum development. Elicit that
     it can be used only as a very 'broad' guideline, it
     does not give enough details about the various tasks
     of a manager. As an example, refer to Item 5: 'To or-
     ganise and implement procedures for collecting and buy-
     ing produce from members'. This statement does not
     tell us anything about the many different tasks invol-
     ved. Point out that a deeper analysis is needed to es-
     tablish the training needs.

14) Distribute the handout 'job specification' and explain
     that this sort of document, which can be produced
     after a more thorough job analysis, is of more value
     to trainers. Explain that the paper just provides an
     extract covering only <u>some</u> of the tasks involved in
     the duty 'to plan and implement collection and buying
     of agricultural produce'.

15) Discuss the 'job specification'. Tell participants
     that various formats are used, some comprise only the
     tasks, others also include an analysis of the know
     ledge, skills and attitudes required of the job-hol-
     der. The latter is, of course, required for a complete
     training needs analysis, although it may not be neces-
     sary to analyse every single task in detail, as in the
     example provided.

16) Point out that a good job analysis will tell us what
     the 'job requirements' are, i.e. what knowledge and
     skill is needed to cope with the job. Compare this
     with the experiment at the beginning of this session
     when participants were asked to select training topics
     without really knowing the job requirements. We are
     now in a better position, and should be able to select
     the topics or subjects that should be included in a
     training programme.

17) Remind participants that 'job requirements' are not the same as 'training needs'. As already mentioned, we cannot, and need not, take up all the job requirements in our institutional training programme because the trainees already have some of the required knowledge or skill (through previous education), and they will easily learn others on-the-job.

18) Point out that the selection of subjects or topics to be included in the training programme must therefore be done on the basis of:

- the job requirements;

- the division between classroom training and on-the-job training,

- the trainees' present skills and knowledge.

The next step, therefore, is to make a 'trainee analysis'.

Training needs?

Possible topics in a training programme for managers
        of consumer co-operatives:

        CO- OPERATION:

        1 Co-operative knowledge
        2 Co-operative law
        3 How to work with the committee
        4 Meeting techniques
        5 How to recruit members
        6 How to educate members

        ECONOMICS:

        7 Basic economics of a consumer co-opera-
           tive
        8 Financial planning and control of the bu-
           siness (Financial management)
        9 Pricing

        SHOP LAY-OUT AND DISPLAY:

        10 Shop layout and equipment
        11 Display of goods
        12 Making signs and posters

        THE STOCK OF GOODS:

        13 The assortment or selection of goods
        14 Ordering systems

        HANDLING OF GOODS:

        15 Receipt of goods, delivery control
        16 Weighing and pre-packing techniques
        17 Price-marking techniques
        18 Shop hygiene and cleaning
        19 Preservation of perishable goods

SALES:

20 Salesmanship

21 Sales planning and promotion

22 Product knowledge

23 Customers' complaints

CONTROL:

24 Stock control systems

25 Stock-taking techniques

26 Leakage control

27 Prevention of shoplifting

28 Cash control systems

29 Basic book-keeping

30 Accounting

MISCELLANEOUS:

31 Staff management

32 Office management

33 Communications

34 Calculations

35 Statistics

36 Use of computers

37 Risk management, insurance

38 Project preparation and appraisal

Extract from ILO-MATCOM:

'Curriculum Guide'

JOB DESCRIPTION (a sample)

TITLE: Manager

FUNCTION: To manage the operations of the Society.

RESPONSIBLE TO: The Committee of the Society.

RESPONSIBLE FOR/

AUTHORITY OVER: All staff members.

DUTIES/RESPONSIBILITIES:

-       To be performed in accordance with the by-laws of the
        society, all regulations and laws related to the ope-
        rations of a Co-operative Society and the policies
        laid down by the Committee of the Society.

 1   To keep the Society premises well maintained and in
        good order.

 2   To open and close the Society office and warehouse at
        the designated times.

 3   To prepare annual and monthly sales and expenditure
        budgets, follow up the budgets and take remedial ac-
        tion when necessary.

 4   To plan and implement a farm supply service.

 5   To organise and implement procedures for collecting
        and buying produce from members.

 6   To organise and maintain systems for the control of
        goods and cash and minimise leakage.

7   To maintain documents and records as required, to keep the books of the Society up-to-date and ready for auditing.

8   To prepare monthly reports for the Committee about the trading results and attend the Committee meetings.

9   To assist the Committee in member education activities.

10   To assist the Committee in the preparation of development plans for the Society and their implementation.

11   To assist the Committee in the recruitment of staff.

12   To prepare work plans and distribute the tasks among the staff.

13   To supervise the staff and provide leadership and guidance for all staff members.

14   To conduct on-the-job training for the staff and suggest other suitable activities for the development and training of staff.

15   To keep all staff members well informed about the affairs of the Society and involve them in development work.

Extract from a Job Specification
for a Co-operative Society Manager

Duties/responsibilities and tasks	Knowledge	Skills
5 TO ORGANISE AND IMPLEMENT PROCEDURES FOR COLLECTING AND BUYING PRODUCE (COFFEE) FROM MEMBERS.		
5.1 Select the most suitable system for collecting and buying produce.	Alternative system The members'need for a collection system.	Physical and financial planning
5.2 Establish "Collection Centres".		Work planning.
5.2.1 Select locations for Collection Centres.	The area - geography and population.	Analysing maps and statistical information.
5.2.2 Organise Collection Centres.	Buying procedures. Produce knowledge.	
5.2.3 Instruct the Collection Centre staff.	Buying-procedures.	Instructional techniques.
5.3 Collect and buy produce.		Work planning.
5.3.1 Inform members about collection.	Communication methods.	
5.3.2 Receive and grade coffee.	Grading classes for coffee.	Assessment of coffee quality.
5.3.3 Weigh.	Weights and measures regulations.	Use of scale.
5.3.4 Record and pay.	The buying price. The recording system. The cash control system.	Issuing purchase dockets. Keeping purchase journal. Cash handling.
5.3.5 Organise dispatch to depot etc.	Produce handling. Transport regulations.	Supervising.

SESSION 2.2

THE TRAINEE

Objective: To   enable participants to describe suitable
            ways of identifying the qualifications of trai-
            nees and to explain why this is important.

Time: 1 hour.

Material: Examples of 'Entry conditions'.

Session Guide:

1)   Remind participants about the purpose of this semi-
        nar. Point out that you are responsible for organis-
        ing and conducting the course. If you fail to improve
        their skills, you are prepared to take the res-
        ponsibility.

        Ask participants if they have the same attitude when
        they conduct courses for co-operative staff and mana-
        gers. They may argue that the trainees are also to
        blame if the result of a course is disappointing.

2)   Point out that the actual and specific reasons for
        failure are more interesting than the question of res-
        ponsibility. Ask participants to suggest possible rea
        sons why they would fail to achieve the objective of
        a course:

        -   the time may be too short;

        -   the objective may be too optimistic;

        -   the content may not be right, too simple or too
            complicated,

        -   the training methods may be unsuitable;

        -   trainees' capabilities have been misjudged.

        Write their suggestions in one column on the chalk-

board, but the last statement on the side.

3) In a discussion, show that there is a link between each one of the first statements and the last one and elicit the following:

- If a trainer makes a correct estimation of his trainees' capabilities, the time will probably be adequate, the contents will be right, the methods will be effective, etc. Thus, one single mistake in the beginning (the faulty assessment of the trainees' capabilities) is the root of all the other mistakes. In other words, if I fail to do a proper 'trainee analysis', I will risk making more mistakes in the following.

4) Point out that this shows the importance of Step 2 in our model. It is obvious that the design of a programme must be done on the basis of trainees' qualifica tions. If we have the opportunity to find out about trainees' qualifications and educational backgrounds we cannot blame <u>them</u> if they have difficulties in benefitting from the programme. It is we who have made some mistakes in the design of the programme, and have failed to adjust it to their level.

Participants may correctly remark that we often have to teach in classes without any advance information about the qualifications of the trainees. Stress that even in these cases we cannot blame the trainees. It is always the responsibility of the training manager and the trainers to design an effective programme for the trainees they have selected and accepted and this cannot be done without a proper trainee analysis.

5) Discuss how we can avoid problems of the type descri- bed above. Elicit the following

- classes must be as <u>homogeneous</u> as possible, i.e. include trainees of similar age, with similar back-

ground, etc.;

- for every course there must be fixed ' <u>entry condi-</u> <u>tions</u>';

- <u>entrance examinations</u> can be arranged for certain courses;

- <u>preparatory courses</u> can be arranged to bring selec- ted trainees up to the required level of educa- tion;

- <u>diagnostic tests</u> can be used in the beginning of a course.

6)   Show on the chalkboard (or by referring to the colle- ge prospectus or other document) the entry conditions at present applied for admission to a particular cour- se at the college. Discuss:

- Are the requirements adequate?

- Is the wording unambiguous?

- How strictly should these requirements be applied?

7)   Ask participants what should be done if one or more trainees in a class are found to have less capabili- ties for studies than the rest of the class. There is, of course, no single 'best solution' to the pro- blem, but elaborate on the practical, human and eco- nomic aspects of the following suggestions:

- let the trainees follow the programme as well as they can, but the trainer should not spend extra time on the 'slow learners';

- the trainer must give them extra support and guid- ance, even if the others will suffer;

- they should be sent home with some advice about other more suitable training possibilities.

Stress that this undesired situation can and should be avoided by proper planning, i.e. carrying out a proper

trainee analysis before the course starts.

8) Remind participants about a common problem regarding the recruitment and training of co-operative managers - the fact that the target is not homogeneous:

- One type of potential managers come directly from secondary school to the management training courses. They are used to studying, but have no work experience.

- Another type is the person who has worked already for some time in a co-operative and is now an aspirant for a management post. He usually has less education, but has on the other hand already learned something on-the-job about co-operative management.

9) Point out the differences in education, e.g. in mathematics and book-keeping and the consequences this will have for the course design. Ask how the problem can be solved.

- The best solution is to have separate courses for these two groups, although the courses will have the same objectives and will prepare the trainees for the same job. However, the course contents will be different with emphasis on different subjects according to the needs of the trainees.

- If the above arrangement is not possible for economic or practical reasons it may be possible to arrange 'preparatory courses'. The group with less formal education may be offered a preparatory course on mathematics, for instance.

10) As a conclusion, ask participants to assess whether you made a proper 'trainee analysis' before this course started. If they do not know, tell them what you did in this respect.

SESSION 2.3

THE TRAINING NEEDS

Objective: To enable participants to explain the pro-
cedures for a training need analysis.

Time: 2 - 2 1/2 hours.

Material: MATCOM's 'Curriculum Guide'.

Handouts:

'Extract from a job specification'. (Session
2.1 Sheet 8).

'Extract from MATCOM's Curriculum Guide'.

Session Guide.

1)   Refer to the model of the systems approach, and point
out that we have now gone through the first two
steps, but we still do not know the 'training needs'.

Show with a simple graph that in the first step (the
job analysis) we identified the knowledge and skills
required to perform the job and, in the second step
(the trainee analysis), the knowledge and skills the
trainees have at present.

Competence required
to perform the job.

The training needs.

A trainee's present
competence.
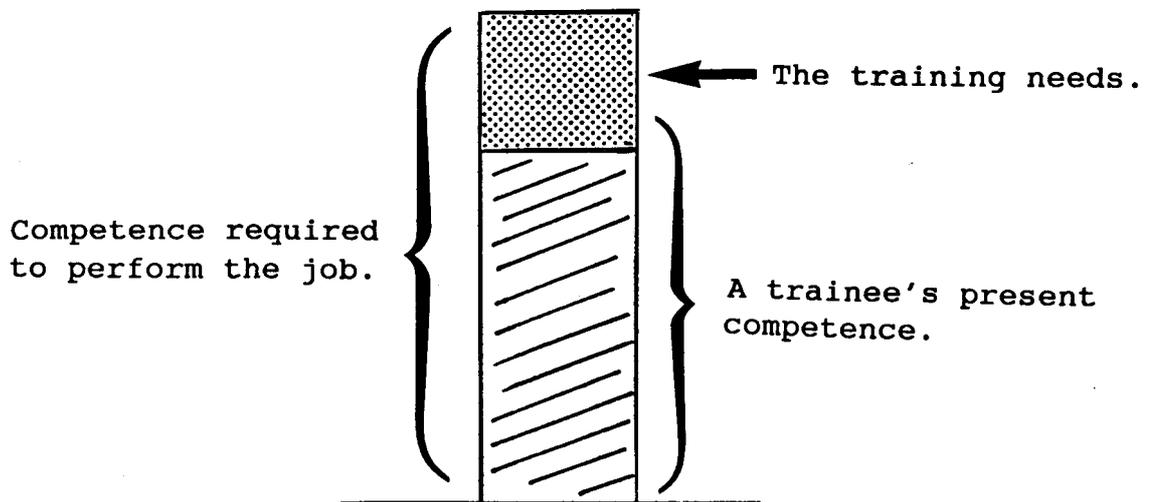
2)   Obviously there is a gap between these two levels.
        Discuss whether this gap is the same as the 'training
        needs', and elicit the suggestion that trainees must,
        in some way or other, acquire the missing knowledge
        and skills in order to become competent managers.
        Note however, that we may not be able to satisfy all
        the needs in our college or training centre.

3)   Remind participants about the experiment in Session
        2.1 on selection of training topics for shop mana-
        gers. Ask them how a serious training needs analysis
        should be done in order to identify the most urgent
        topics for the course. Discuss and agree on a practi-
        cal approach, including the following main considera-
        tions:

        -   A 'curriculum advisory group' (such as described
            in Session 2.1) should be involved in this work.
            It is an advantage if the group has a member who
            has authority to make decisions in curriculum mat-
            ters.

        -   The job analysis (listing the 'job requirements'),
            arid the trainee analysis should be the basis for
            the training needs analysis.

        -   The group will identify those job requirements
            which should be subject to training in the colle-
            ge. The requirements should be clearly specified
            to facilitate the preparation, later on, of exact
            training objectives. (It is not enough to state
            'marketing' as a requirement, it is necessary to
            specify, for instance, 'sale of crops through all
            available channels on the domestic market'.)

        -   At this stage there is no need to plan the struc-
            ture of the whole training programme, i.e. to de-
            cide whether there should be one longer course or
            several shorter ones, and which subjects should be
            included in which course. What is needed now is
            simply a definition of the topics which should be
            taught in the college.

4)   Explain that the task of setting exact training objecti-
ves for each subject/topic can be done in this same
work step but we will deal with it as a separate task
in a following session.

5)   Tell participants that we will now discuss some exam-
ples which illustrate the importance of a careful and
thorough analysis of the training needs, and some prob-
lems.

6)   Show a copy of MATCOM's 'Curriculum Guide' to partici-
pants, and explain how it can be used as a resource do-
cument in curriculum development work. Explain that the
common job requirements have been translated into train-
ing subjects and topics, and a *training* objective has
been suggested for each topic. Point out that a docu-
ment like the 'Curriculum Guide' may be very useful,
but it does not relieve us of the basic work of decid-
ing which training needs our target group have and
which *training* topics we should have on our timetable.
To prove this point, display the following topics on
the chalkboard/flip chart:

	Imp.	Prior.
Cash Budgeting	1	1
Livestock insurance	2	3
Shipping	3	3
Member education	2	2
Percentage calculations	1	3
Shop hygiene	1	3

7)   Discuss which of the above topics are important or
necessary for a manager of a typical multipurpose
co-operative in their region. Read the objectives
stated in the 'Curriculum Guide', (if required). Mark
the topics according to participants' suggestions as:

1)   Very important
2)   Rather important
3)   No importance

8)   Then ask participants to suggest which <u>priority</u> should be given to the topics; which must be included and which need not be included at all on our first, basic training programme. Mark these priorities in the same way:

1) High priority
2) Lower priority
3) Not included

9)   The result may not be as indicated in the table above, but tell participants that the purpose of this short discussion was not to reach a decision, it was just to demonstrate the difficulties facing us in a 'training needs analysis'. Sum up the discussion:

- Topics which are important for the operations of a co-operative must, of course, be included if the trainees have no previous training. (Cash budgeting.)

- Other topics might be equally important, but there is no real need for further training. (Calculations.)

- Some topics are obviously not related to the job of the trainees (Shipping).

- Other topics are useful, but not crucial for immediate operations. They should be included on the programme, however. (Member education techniques.)

- Some topics may be needed, but training will be organised by other specialist agencies (livestock insurance) or on-the-job (Hygiene).

- Training may be needed in topics which are not included in the 'Curriculum Guide'. (Calculations.)

10)   Point out that the choice between on-the-job training and institutional training is often difficult.

Ask participants to think about the training of cashiers in a supermarket, and assume that the following alternatives are possible:

a)   The cashiers are trained on-the-job, i.e. initially they are instructed and supervised by a competent cashier, and they learn while serving the customers.

b)   The cashiers are sent to an off-the-job training centre for a two-day course before they take up their jobs.

11)   Ask participants to vote for the alternative they prefer. Ask those who voted for on-the-job training to give their arguments, which may include the following:

-   trainees will not be away from their jobs, training cost will be very low;

-   trainees will be trained on the type of equipment (cash registers) actually used in their shops;

-   it is too costly to equip a training centre with cash registers.

12)   Ask those who voted for classroom training to give their arguments:

-   trainees can make costly mistakes while learning on-the-job;

-   customers will complain about inadequate job performance while cashiers are learning;

-   it is possible to simulate realistic situations in the classroom;

-   it is easier to 'condense' the training in a classroom and practise all possible problem situations in a short time.

13) Sum up by pointing out that the choice in this case seems to be <u>a cost-benefit problem</u>, and that the same applies to training of other skills, such as display of goods in a shop, using computers in accounting, preparing records, maintaining systems for cash control, etc.

14) Remind participants that the matters selected for the institutional training programmes should be specified in detail even at this stage so that the trainers can prepare more precise training objectives later. The topic 'marketing' was mentioned earlier as an example of a statement that was too vague. Another example:

Tell participants to think about the topic 'pricing'. Ask them to mention everything possible that could be considered in a training course on 'pricing', e.g.:

- Costs   - Supply-demand

- Gross margin needed   - Price control

- Competition   - Sales volume

- Price policy   - other topics.

Point out that it would take considerable time to cover all these matters, but the trainees would then learn to take the full responsibility for fixing the selling prices.

15) Tell participants that some shop managers need not worry about all these aspects, they may be told by an apex organisation what mark-up percentages to apply on the different types of goods, and all they have to do is the calculation. Suggest that it should be sufficient to teach only the following subjects in this case (instead of all those mentioned above):

- percentage calculations,

- how to use a calculator.

In other cases the managers may be given a price list

where they can look up all the selling prices. In this case they may not need training in this area.

16) Ask participants if they want to include some of the topics first mentioned – even if the managers do not need the training to be able to perform their jobs. What is the value of this 'extra study' compared to the time and money saved if we only concentrate on the job requirements?

17) Explain to participants that considerations of this type are common in curriculum development work. It is necessary to specify the main subject-matter contents already now during the 'training needs analysis'. If we leave it for the trainers to decide later we may have different solutions in different courses, and a vague curriculum as a result.

18) Emphasise the dual purpose of a 'contents analysis': to specify the 'learning points' and to facilitate an assessment of the time needed for the training. Go through the following example:

- Ask participants to assume that one training topic will be 'How to select a supplier'; the objective is to enable trainees to select a suitable supplier of farm inputs. Ask participants to suggest the possible 'content' of the training. They may suggest that trainees should learn the following:

- What information is needed before a choice can be made? (Which suppliers are available, their locations, what are their assortments, prices, delivery times and conditions, payment terms, reputation for service, reliability, etc.)

- How to obtain the information.

- How to assess the information.

19) Point out that all these suggested items will certainly

be needed in a pre-service course offered at a locat-
ion where co-operative managers have the possibility
of choosing among several suppliers. It is important
that they learn to select the best one. Remark that it
may take six to eight hours to teach them how to do it.

Ask participants if they would need to include all
these topics in a training programme if they knew that
the managers in reality had no choice; in other words,
they were obliged to buy from one certain supplier,
like a co-operative wholesale society, or a state-owned
monopoly. If so, the training time could probably be
reduced to one hour, or the topic eliminated altoge-
ther.

20)   Participants may in a discussion suggest that the topic
should nevertheless be included, for reasons of 'gen-
eral education', 'useful knowledge for managers' or the
like. Point out that this is a matter for the persons
responsible for the curriculum to decide, and that they
will also have to consider the difference in time allo-
cation for the topic.

The chart below shows the suggested time allocation for
the topic when only the actual job requirements are con-
sidered:

	Pre-service basic course	In-service refresher course
For managers with a choice	6h	1h
For managers in a monopoly situation	1h	--

21)   Refer participants to the handout 'Extract from a job
specification' used in Session 2.1 Sheet 8. Ask them to
study the job requirements and to specify and write
down individually a list of topics which they believe
should be included in college training for young inex-

perienced trainees which would cover the listed job re-
quirements.

22) After about ten minutes, distribute the 'Extract from
MATCOM's Curriculum Guide' and any local curriculum
covering the topic 'Collection of produce', if avail-
able. Ask participants to compare their own lists with
these lists. Allow about ten minutes for this, then ask
participants to comment. Pay particular attention to
the following matters:

- What, if anything, is missing in the MATCOM list and
  the local curriculum? What is superfluous?

- Which of the 'job requirements' should be subject to
  training 'on-the-job' or in other places, but not in
  college?

23) Sum up the discussion. Stress again that it is necess-
ary to make a thorough analusis of the job require-
ments and all possible training subjects and topics,
and not to rely fully on any old local document, or any
external handbooks, as demonstrated in this exercise.

24) Ask one participant to sum up the important points to
remember when making a 'training needs analysis' and
deciding which job requirements should be covered by
training subjects/topics in a college training program-
me:

- An advisory group of experts to be involved.

- The 'job analysis' and the 'trainee analysis' should
  be used as a basis.

- MATCOM's 'Curriculum Guide' can be used as a resour-
  ce document.

- Every job requirement should be scrutinised - it
  should be turned into a well defined training topic.

- Training topics should be job-oriented.

- In addition to directly job-oriented topics, other related topics may be added if they are considered to be useful for the trainees.

Extract from ILO-MATCOM:
'Curriculum Guide'

SUBJECT: Collecting and receiving agricultural produce

TOPICS: **The collecting and receiving system.**

- To enable trainees to describe a collecting
  and receiving system as a whole and to iden-
  tify the critical stages and operations with-
  in it.

Management alternatives.

- To identify the alternative ways of organis-
  ing each stage of a collecting and receiving
  system, to determine the factors affecting
  this choice and to select the most appropri-
  ate methods for a given set of circumstan-
  ces.

The cost of collection.

- To calculate the total cost of alternative
  collection systems.

The number and location of collection points.

- To determine the most economical number and
  location of collection points for a given
  crop.

Optimising management decisions.

- To measure trade-offs involved in crop col-
  lection problems and to design optimum solu-
  tions.

Transport scheduling.

- To schedule the collection of crops in the
  most efficient way.

Informing members about collection systems.

- To select appropriate methods for informing
  members about collection arrangements.

Designing the communication.

- To effectively convey information about col-
  lection arrangements through the written and
  the spoken word.

Bag systems.

- To design and operate effective systems for the delivery, recovery and payment of temporary packing materials.

Designing the reception system.

- To design, to staff and to physically lay out an effective crop reception system.

Queuing.

- To minimise members' waiting time at reception centres.

Sampling.

- To select samples of an appropriate size and kind in order to achieve a desired level of confidence in the results they indicate for the whole crop.

Grading.

- To explain the necessity for crop grading and to select appropriate methods for grading their members' produce.

Deception and prevention.

- To anticipate attempts to defraud members of the society, and to close the loopholes that make such attempts possible.

Calculations and payments.

- To design and operate simple, rapid and secure systems for calculating amounts due and making appropriate entries or payments for members' credit.

Recording procedures.

- To design, install and manage effective systems for recording the results of the receiving and grading operations.

Disputes and decisions.

- To apply what they have learned to solve any problems, and to identify and forestall particular disputes or disagreements between management, the society and its members.

SESSION 2.4   THE TRAINING SCHEME

Objective: To enable participants to design a suitable
               programme of courses to make up a job-oriented
               training scheme for co-operative staff and
               managers.

Time: 1 hour.

Material: Handouts:
               'When to study what?'
               'A training programme for shop managers.'
               'The training complex for staff of consumer
               co-operatives.'
               Case study with appendices.

Session Guide:

1)   Refer to the poster showing the 'systems' approach
       (See Session 1.2 Sheet 6). Review where we currently
       stand after having completed the first three steps:

       - we have identified the knowledge and skills re-
          quired to perform the job (Step 1);

       - we also have an idea about the qualifications of
          our trainees (Step 2);

       - we have identified the training needs, and listed
          the topics which should be included in the train-
          ing programme (Step 3).

2)   Ask participants if we now have sufficient informa-
       tion to start designing the training sessions. They
       should identify the following remaining preparations:

       - we have to determine the 'format' of our training
          programme – should we have one long course, or
          split it up into two or more shorter courses?;

- if we choose to have several courses, we need to plan the programme of courses and determine the aim and contents of each course;

- the exact objective of each subject and topic should be specified.

3) Define and clarify the terminology for different training activities (as used here):

- A <u>course</u> is one training period, its duration may be from one day to several months. For shorter courses we also use the terms 'seminar' or 'work-shop'.

- A <u>training programme</u> or a <u>training scheme</u> consists of all the interrelated courses offered to a particular group of trainees. For instance, the training programme for co-operative managers may consist of one basic, one intermediate and one advanced course. Some programmes, do indeed, consist of only one course.

- A course is made up of <u>training sessions</u>, short periods of training activities dealing with specific subject matters.

(Explain that the above definitions are not in any way standardised; usage differs very much.)

4) Ask for a volunteer who is willing to prepare a presentation of the training scheme for co-operative managers offered by his college. Explain that the presentation (a short lecture) should describe how the system is built up, the purpose of the various courses, etc.

To facilitate the volunteers' preparation, ask the other participants to mention what they want to know about the training system. Ensure that the following points are mentioned; the underlined words should be noted on a flip chart and by all participants:

-   For whom is the training <u>available</u>? Is the system open to all potential managers? What are the <u>entry conditions</u>? What has been done to make classes as homogeneous as possible?

-   What is the <u>duration</u> of the programme? Is this more or less than in other similar colleges?

-   Is the programme based on one long course or some shorter courses; what are the reasons for the <u>system</u> chosen?

-   What is the <u>aim</u> of each course?

-   Which <u>subjects</u> are included in the different courses; how much <u>time</u> is allocated to each subject?

-   Is the institutional training <u>co-ordinated</u> with training activities in the co-operatives?

-   Is the programme linked to a <u>career</u> system; does completion of a course lead to promotion and higher wages?

-   Who is <u>responsible</u> for the curriculum of the management training programme?

-   Has the system been <u>evaluated</u> recently? How was it done? What were the results?

5)   After listing the questions, explain that the list illustrates topics that must be considered when designing a training scheme.

Tell the volunteer that later he will be informed about the exact day for his presentation. (This will be part of the assignments outlined in Session 3.9. Keep the flip chart with the questions until then).

6)   Return to the question of deciding the contents of each course in a training scheme. Ask participants to assume that they will have three courses in a programme on retail management. The first course is given to newly employed shop assistants, the second

course is intended as training for shop supervisors, and the last course is for shop managers. Show the diagram 'When to study what?' on the chalkboard or ohp, but without the titles of the training topics (see the handout).

Ask participants to suggest which topics should be included in the three courses and write their proposals in the diagram. Discuss briefly the usefulness and general relevance of the topics on each level, and agree on a sensible syllabus like the one suggested in the handout. The following aspects may be mentioned in the discussion.

- Trainees must be able to apply what they learn immediately after the course. Therefore, topics like accounting and personnel management should not be included on the lowest level.

- Newly employed assistants must quickly be trained for their key tasks of serving the customers otherwise they may do more harm than good for the co-op erative. (Some of the important tasks will also be trained on-the-job, of course.)

- Some topics are so important that training will continue throughout the career (co-operation, salesmanship).

- If a topic is included on all three levels, it is necessary to define the contents and set objectives for each level to avoid confusion.

To conclude this exercise, emphasise the importance of analysing the sequencing in this way, to make the training as job-oriented, meaningful and effective as possible. Also stress the importance of describing the courses (title and aim) in terms that their functions and place in the total system can easily be identified.

7)   Refer to the question mentioned under Point 4 about

linking the institutional training to 'practice per-iods' or on-the-job training in a co-operative so-ciety. Point out that this is one way of making train-ing more job-oriented, and bridging the gap between the college and the co-operatives it serves.

Distribute the handout 'A training programme for shop managers'. Explain that this 'sandwich-type' program-me consists of short courses in a college with inter-mediate work periods, when the trainees also study on their own a series of booklets related to their work (the MATCOM 'Elements' for shop personnel; show some examples). Ask participants to study the outline for a few minutes, then discuss and clarify any ques-tions.

8) Refer to the question of 'careers' in the co-opera-tive movement. Stress the need for an employee to see the possibility of making a career in his work by suc cessfully completing the required training courses and obtaining more and more responsible positions. Mention the three courses discussed in Point 6 as an example of a training scheme with such features.

9) Distribute the handout: 'The training complex for staff of consumer co-operatives'. Explain the system illustrated by the chart:

-   Employees enter into the system with varying educa-tional background.

-   Trainees will go through certain training program-mes, depending on their backgrounds.

-   All trainees have the possibility of advancing through the system, and even to continue to other studies and other jobs in the co-operative sector, (such as co-operative inspectors, auditors, train-ers, union managers, etc.).

10)   If required, continue with the case study described below (Points 11 – 18), otherwise conclude the session by asking one participant to sum up the main points of this session; allow him to use the key words listed on the flip chart under Point 4 of this session as a reference.

Supplementary exercise:

The following exercise should be included if participants will be involved in curriculum work and need more examples and practice of the procedures. It is, however, based on a case study and a lengthy group work, and it may therefore be wise to postpone it until participants have been introduced to these techniques in Topic 4 (See Session 4.4 Point 12). It may then serve a dual purpose; as an exercise in curriculum planning as well as being a practical example of the case study method.

11)   Distribute the case study and allow participants 10 – 15 minutes to read it through (or have it distributed and read prior to this session).

12)   Explain orally the assignment. Point out that the main purpose of the exercise is to review the procedures in curriculum development work, and that it is not possible to create a 100% realistic background in this exercise. Therefore, participants are free to make assumptions when the background information is not sufficient. This may apply especially to the 'training needs analysis'. They may also use the sample Job description from Session 2.1 as a reference.

13)   Discuss possible approaches to the work. Then distribute Appendix 1, which outlines a possible 'work plan'. Compare this one with the proposals from the participants. Tell participants that the groups will themselves, determine their approaches.

14)   Inform the groups on how the presentation should be
      done. Distribute copies of Appendices 2 - 4.

15)   Divide participants into groups of five or six mem-
      bers. Instruct them to begin with planning of their
      own work: they should agree on an approach (as in
      Appendix 1 or modified), and they should make up a
      timetable so that the work will be finished on time.

16)   Allow up to 3 hours for the group work.

17)   The groups present their complete proposals in a ple-
      nary session. After each presentation, the following
      matters should be discussed and assessed by the whole
      class:

      a) The division between on-the-job training and for-
         mal training; how much time will the trainees
         spend in the classroom during the four-year per-
         iod?

      b) The division between on-the-job training and for-
         mal training; which subjects have been included in
         formal training programmes?

      c) Have all training needs been catered for? Have all
         necessary training topics been included on the pro-
         grammes and allocated sufficient time?

      d) Are there any unnecessary training topics on the
         programme?

      e) The sequencing of the training activities; is the
         training in line with the career scheme and the in-
         creasing responsibilities of the trainees?

      f) Have the formal training activities been closely
         linked with work and practical assignments in the
         societies?

      g) Does the programme look realistic from a practical
         point of view, - not too long and not too many
         short formal training events? Is the trainees'

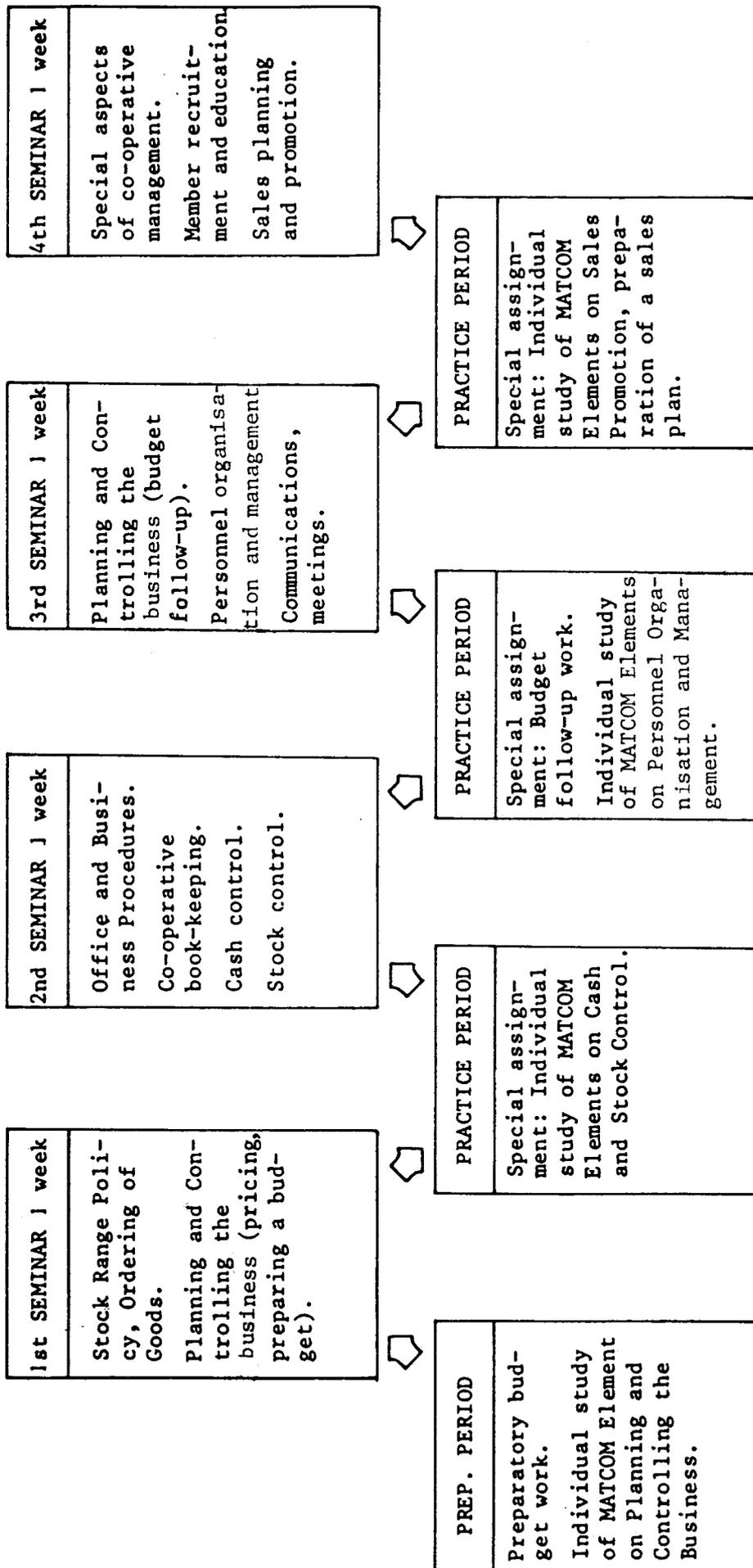workload evenly distributed over the period?

h) Are the aims for each training event included relevant and realistic?

i) Is the proposed training content relevant and is the time estimate realistic?

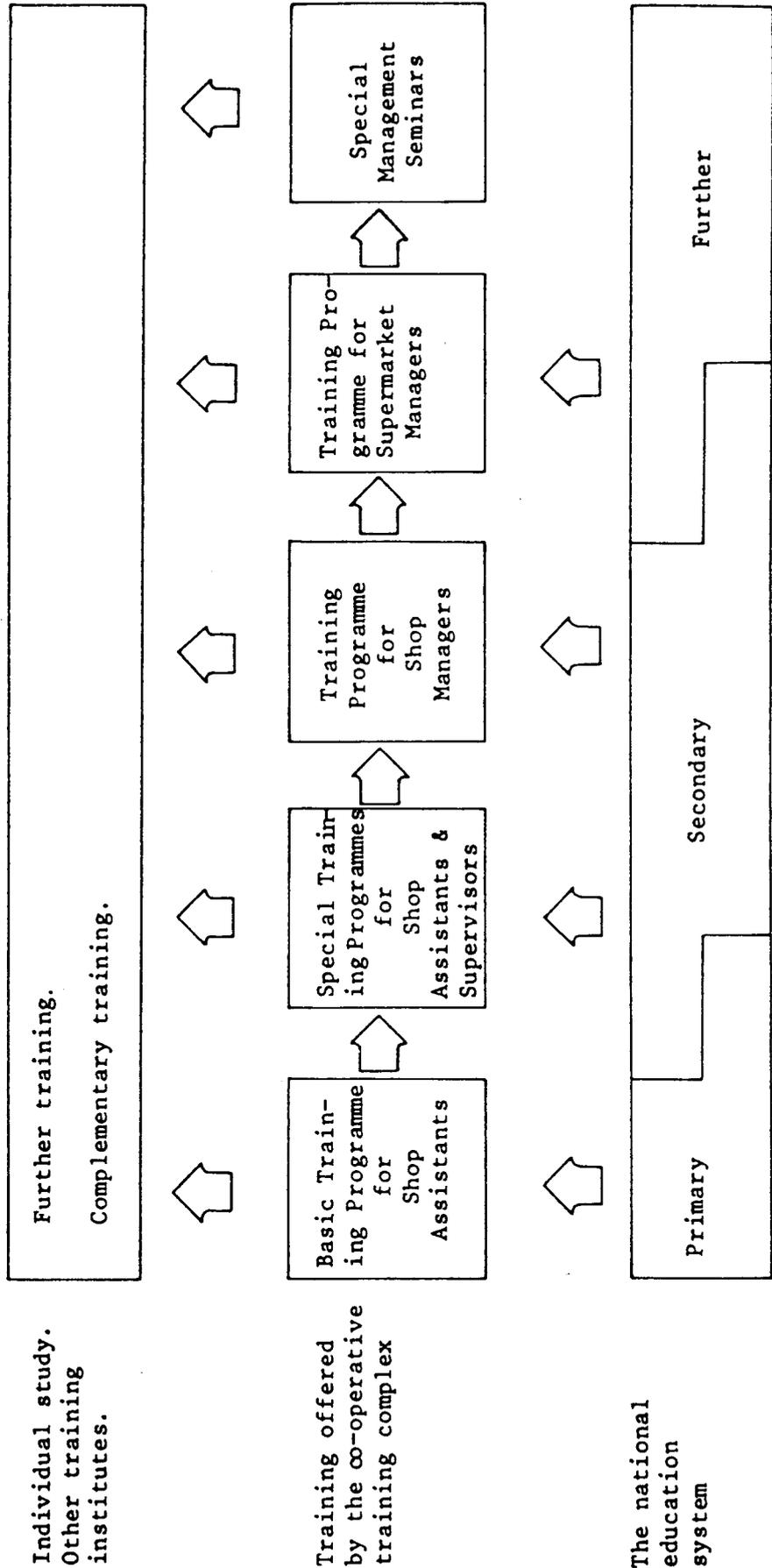18) The groups' complete reports are copied and distributed to all participants.

WHEN TO STUDY WHAT ?

REQUIREMENTS

ON-THE-JOB

and the corresponding

TRAINING NEEDS

SHOP MANAGERS

Planning and Controlling the Business.

Book-keeping. Accounting.

Personnel Organisation.

— | — contd. ——→

— | — contd. ——→

— | — contd. ——→

— | — contd. ——→

— | — contd. ——→

— | — contd. ——→

— | — contd. ——→

SHOP SUPERVISORS

Record keeping. Office and Business Procedures.

Personnel Management.

Stock range policy. —

Sales planning and promotion. —

Stock control. —

Cash control. —

— | — contd. ——→

— | — contd.

— | — contd.

— | — contd.

SHOP ASSISTANTS

Cash handling. —

Goods handling. —

Salesmanship —

Product knowledge. —

Co-operation. —

TRAINING PROGRAMME FOR SHOP MANAGERS

- AN EXAMPLE

1st SEMINAR 1 week
Stock Range Policy, Ordering of Goods. Planning and Controlling the business (pricing, preparing a budget).

PREP. PERIOD
Preparatory budget work. Individual study of MATCOM Element on Planning and Controlling the Business.

PRACTICE PERIOD
Special assignment: Individual study of MATCOM Elements on Cash and Stock Control.

2nd SEMINAR 1 week
Office and Business Procedures. Co-operative book-keeping. Cash control. Stock control.

PRACTICE PERIOD
Special assignment: Budget follow-up work. Individual study of MATCOM Elements on Personnel Organisation and Management.

3rd SEMINAR 1 week
Planning and Controlling the business (budget follow-up). Personnel organisation and management. Communications, meetings.

PRACTICE PERIOD
Special assignment: Individual study of MATCOM Elements on Sales Promotion, preparation of a sales plan.

4th SEMINAR 1 week
Special aspects of co-operative management. Member recruitment and education. Sales planning and promotion.

- The Institutional Training Programme is divided into four one-week seminars with intermediate periods of work, special assignments and individual studies.

THE "TRAINING COMPLEX" FOR STAFF OF CONSUMER CO-OPERATIVES

- AN EXAMPLE

Individual study.
Other training institutes.

Further training.
Complementary training.

Training offered by the co-operative training complex

Basic Training Programme for Shop Assistants

Special Training Programmes for Shop Assistants & Supervisors

Training Programme for Shop Managers

Training Programme for Supermarket Managers

Special Management Seminars

The national education system

Primary

Secondary

Further

Case study.

_____

MEMO   THE FEDERATION OF AGRICULTURAL CO-OPERATIVES

TO: The Principal, Co-operative College

FROM: The Board of Directors

SUBJECT: A new scheme for training of future Managers of
              Agricultural Co-operatives.

Our latest manpower survey shows that there is an annual
average turnover of 30 primary society managers through
retirements, transfers, etc. Replacements are taking place
through advertisements, and candidates apply for these
posts both from outside and inside the movement. It is a
fact that few of the applicants who are appointed nowadays
have undergone appropriate training on how to manage agri-
cultural marketing and supply co-operatives. This is the
reason why we need to strengthen our training efforts and
we request you to take action for the implementation of a
new management training scheme with effect from the begin-
ning of next year.

As a first step we request that you submit your proposal
for a training system that meets the requirements listed in
the following.

The new scheme

On-the-job training and formal institutional training will
take place on a rotation basis during a period of four
years.

The training will be connected to a career scheme, and a
fixed salary scale will be applied during the career. Dur-
ing the first year a trainee will have the designation of
Management Trainee, during the second year he will be Assis-

tant to the Manager, during the third year Assistant Manager. After four years of successful on-the-job training and in the college, the trainees will be qualified to apply for management posts in primary societies.

During the four year period the trainees will be employed by selected societies and report directly to the managers. The training activities will have to be interrelated so that the formal training activities complement, support and strengthen the training on-the-job. You will be responsible for the formal training, and the managers of the selected societies will be responsible for the on-the-job training. It is, of course, necessary to plan and implement the training programme in close collaboration with the managers of the selected societies. Before we approach the managers, however, we would like you to work out and submit profile of a training system, based on the facts given in this memo.

The training system must, of course, be fully co-ordinated with the career scheme, which implies that a trainee should be able to take on the responsibility of more and more qualified tasks in the course of his career. The training system should make this possible, and consequently the timing of the various training inputs during the five year period is of utmost importance.

Naturally your proposals for a new training system have to be based on the common tasks of a society manager. In addition, however, there are certain aspects and functions of a manager to which you should give special considerations because of current problems in the societies. We have included those aspects in the following list which we have compiled in order to facilitate the preparation of your proposals.

Basic training needs

The 'routine tasks' of a society manager are well reflected in the model Job Specification, issued by the Federation.

We now have to ensure that the college training will be more job-oriented than before. We suggest that you carefully reconsider which training topics you should include in the college curriculum, which you should leave for on-the-job training, and when the various topics should appear throughout the training period.

Member education, member relations

We consider a manager's relationship with the members as one of the crucial factors for success of a society. This implies that a manager should have a thorough knowledge of the actual conditions of the members, especially the problems related to their farming and their economy. We want you to plan how this crucial relationship could be covered in the training.

Collecting produce

It is a fact that at present many societies are not organising the collecting and receiving of farmers' produce in an effective way. This has caused severe problems and disloyalty to the Co-operatives in some places. We want you to suggest how to overcome this problem. A related problem is 'quality control', and we appreciate your suggestions for improved training in this field.

Transport

Experience shows that this is a major problem in most societies. In spite of high costs, the transport is often poorly organised. We suggest that the new trainees should become involved (on a practical basis) in these matters as soon as possible. They could, perhaps, be instrumental in surveys of the societies' transport situations, and later in re-organisation of the transport, when needed.

Financial management, Accounting

Your present curriculum includes a rather comprehensive but

general course of study on financial management. We believe that the formal training time could be shortened if the programme were more job-oriented and geared towards the actual procedures now used in the co-operatives. We need a well-planned approach which ensures that trainees quickly become 'productive' in their managerial duties.

In this connection we have discussed whether training could help to overcome some of the present difficulties regarding with investments and plans for development of the societies. There is, generally, a lack of initiative from the co-operatives and we believe that the main reason is that managers and committees (at present) lack the capability of assessing possible ideas from a financial point of view. Any training input to improve this situation would greatly benefit co-operative development.

Supply services, Credit services

We know through research that services to members can be further improved, and this applies both to the practical management of supply of farm input and to credit services. The trainees should probably have more specialised training in these fields than hitherto, and if possible their studies should be linked to field assignments in their societies, so that their training will give quick returns in the form of improved services in their respective societies.

Marketing

In addition to the traditional crops now grown there exist, in many societies, a potential for further production, e.g. of eggs and vegetables to be marketed in neighbouring towns. The trainees should be given skills and knowledge to undertake feasibility studies in this field.

Concluding remarks

Some of the studies which we suggest above are connected
with practical assignments (surveys, research) in the socie-
ties where the trainees work. These studies should result
in reports, prepared by the trainees and endorsed by their
managers, who should also submit these reports to the com-
mittees. We envisage that this approach will have several
positive effects: the training will be directly connected
with the work and the problems in the societies, the trai-
nees will have the support of the experienced managers, and
the implementation of the recommendations may lead to im-
proved performances already within the four-year period.
All these facts will further create motivation for the
trainees.

You are also asked to consider the fact that the trainees
must not be taken away from their jobs for any longer per-
iods. The Federation wants to remind you that resources for
training are limited; every cent spent on training must be
returned in the form of increased efficiency of the co-oper-
atives.

We look forward to your suggestions for a new training sys-
tem in accordance with the framework presented in this
memo.

John Cooper, Chairman
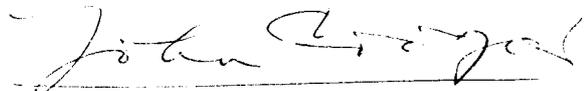
for the Board of Directors

Case study – Appendix 1

Work plan

Assume that you have received the memo from the Board of Directors. Do the following in order to prepare a reply.

1.   Analyse the job requirements. Make a list of all skills and knowledge (training subjects) to be covered during the four-year period considering all the information given in the memo.

2.   Determine minimum 'entry qualifications' for applicants to the training and career scheme.

3.   Decide which training subjects should be covered by formal training and which should be covered by on-the-job training.

4.   Determine a proper sequence for the training subjects. When should the various subjects be dealt with during the period?

5.   Indicate on a 4-year line how the whole period is divided into training activities: Formal Training Events (F) and On-the-Job Training Periods (O). Use the special form attached (Appendix 2). Give each activity a name (and a number) to facilitate reference to your plan.

6.   Describe briefly each training activity, using the forms provided (Appendix 3).

No.   Name of activity
Case study - Appendix 2

A Profile of a

4 - year Training Scheme for Managers of Primary Co-operative Societies

||||||| = On-the job training periods (open lines)   01, 02, 03, etc.

||||||| = Formal institutional training evenets (filled in) F1, F2, F3, etc.

199_

199_

199_

199_

199_

Case study – Appendix 3

On-the-Job Training Period   No.: _____
Formal Training Event

Name of Activity:

Duration, dates:

Aim, brief description of activities:

_____

Case study – Appendix 3

On-the-Job Training Period   No.: _____
Formal Training Event

Name of Activity:

Duration, dates:

Aim, brief description of activities:

No.   Name of activity
Case study – Appendix 4

A Profile of a

4 - year Training Scheme for Managers of Primary Co-operative Societies

≡ = On-the job training periods (open lines)   01, 02, 03, etc.

≡ = Formal institutional training events   (filled in) F1, F2, F3, etc.

199_

199_

199_

199_

01   INDUCTION PERIOD

F1   INTRODUCTORY COURSE 4 W.

02   OJT - COLLECTION and TRANSPORT

F2   BASIC MANAGEMENT COURSE 10 W

03   OJT - SUPPLY SERVICES   etc.

SESSION 2.5

THE OBJECTIVES

Objective: To enable participants to explain the advan-
               tages of having clear-cut objectives for train-
               ing programmes, courses and sessions, and to
               formulate such objectives.

Time: 1 - 1 1/2 hour.

Material: Text for ohp transparencies or flip chart:
               'Preparation of Objectives I and II'.
               'MATCOM's Curriculum Guide'.

Session Guide

1)   Remind participants about the need to state the aim
       (or objective) of each training event, as mentioned
       in the previous session (Session 2.4 Point 2). Point
       out that even such a seemingly simple task requires
       careful consideration and that lack of accuracy may
       weaken the whole training programme.

       Ask participants how they react to the following ob-
       jective: 'Trainees should learn to appreciate the im-
       portance of an effective stock control.'

       The answers will certainly illustrate the ambiguity
       of such a statement. Some may suggest that this is
       very important, and that it would take a day or two
       to teach how to set up and use a stock control sys-
       tem. Others may say that the statement refers to
       'understanding' the need for a stock control only,
       not to be able to do it.

       Explain that we have to take some time in this course
       to learn how to avoid problems of this type.

2)   Explain that the two terms 'aims' and 'objectives'
       have slightly different meanings in this context:

- the <u>aim</u> is a statement of the general purpose of a training programme or a course (e.g. 'to introduce trainees to the stock control system');

- the <u>objective</u> describes in more exact terms the expected result of a training activity (e.g. to enable trainees to keep a stock control record).

3) Point out that teachers have surely always had some notions of the aims and objectives of their courses and sessions. It was not however until the appearance of the 'instructional technology' (the systems approach) in the sixties that a technique of preparing very precise objectives was developed. It then quickly became 'a must' to write such objectives in all training design. This however resulted in a misuse of the technique, and nowadays we have a more rational view on the use of training objectives. Point out that the exact objectives have nevertheless proved to be very useful in certain co-operative *training,* and we will therefore demonstrate the technique through an example.

4) Explain that what you will do is, step-by-step, formulate a succinct and complete objective. This step-by-step process will teach how such objectives can be best formulated.

5) Use the series of objectives listed in the paper 'Preparation of objectives I' as a basis for the demonstration. Copy each statement on a transparency for ohp or write it on a flip chart. Show one statement at a time, and discuss (and comment) as outlined below:

a) The objective of the course is to teach trainees about percentage calculations.

   <u>Comments</u>: The objective should not be for someone to teach, but for someone to learn. Alter the text in point a) to read 'is for the train-

ees   to   learn...'.   But   how much should they
learn about percentage calculations? Let us as-
sume that trainees are shop assistants. We have
to be more specific.

b)   The objective of the course is for trainees to
learn   the   percentage   calculations   they   use   in
their work.

Comments: The only percentage calculations they
use are for deduction of cash discounts, so why
not say so?

c)   The objective is for trainees to understand how
cash discount calculations are done.

Comments: Is this really what we want to achie-
ve - an understanding only - not the ability to
do it? What do we actually want the trainees to
be able to do after the training? Every objec-
tive must state the desired result - an observ-
able action.

d)   The' objective is to enable trainees to calculate
cash discounts on sales.

Comments: That is an observable action. We can
easily see if trainees can do this after the
training. But is it OK if they use a calcu-
lator?

e)   The objective is to enable trainees to calculate
cash discounts on sales, without the use of a cal-
culating machine.

Comments: This is better, because we have now
stated an observable action and we have stated
the condition for its performance. But we have
said nothing about the standard of the perfor-
mance. Suppose that trainees use five minutes
for a simple calculation and still make some
mistakes.

f) The objective is to enable trainees to calculate cash discounts on sales, quickly, accurately and without the use of a calculating machine.

> Comments: The words 'quickly' and 'accurately' can mean anything, and it will be hard to measure if we actually achieve the objective. Let us make a final adjustment to the statement.

g) The objective is to enable trainees to calculate cash discounts on sales without the use of any calculating machine. The trainee will be considered successful if he completes the final test in 15 minutes with fewer than three errors.

> Comments: This means that we have to construct the final test now – at the same time as we decide the objective.

6) Point out that this example, for demonstration purposes, was a bit exaggerated, but it illustrates three important principles if we want to set up exact objectives:

An objective should state

- the final behaviour (an observable action),

- the conditions for the performance,

- the standards to be reached (measurable criteria).

7) In the following exercise use the ohp (or flip chart) to show the objectives listed in the paper 'Preparation of objectives II'

Show the first example and ask participants to improve it. If possible, apply the three criteria mentioned under Point 6. After a short discussion in bee-hive groups, ask for suggestions and write the best one on the chalkboard, or show the one suggested in the paper.

Continue in the same way with the other objectives.

8)   Stress again that words such as 'know', 'understand' or 'appreciate' are usually too vague to describe the objectives, and that the use of <u>behavioural</u> terms will make them clearer. Ask one participant to suggest a suitable word, write it on the chalkboard, ask the next participant for another word, etc. and go round the whole class until no more suitable 'action words' can be found. The following ought to be included in the final list on the chalkboard:

explain, describe, define, list, name, recognise, select, demonstrate, discuss, organise, plan, implement, determine, decide, assess, choose, analyse.

9)   Explain and discuss the use of MATCOM's 'Curriculum Guide' in this context. Show that the objectives proposed in the Guide cannot always be used as they are by discussing the examples related in the chapter 'Training Objectives' in the Guide.

10)   Sum up the advantages of preparing objectives and discuss some of the problems. Cover the following points:

-    When planning training programmes, we must determine the objective of each course and each training subject and topic included.

-    When planning a single training session, it is also necessary to define what we want to achieve in that particular session by writing an objective.

-    Often it is advantageous to express the objective in behavioural terms.

-    If trainees know precisely what is expected from them, they make greater effort.

- On the other hand, learners are better motivated if they themselves are involved in setting the objectives (particularly adult learners).

- Objectives limit the tasks of the teachers to clearly prescribed areas, possible misinterpretations are avoided and various training inputs can more easily be co-ordinated.

- Objectives make it easier to measure the results and effectiveness of training programmes.

- Course objectives, published in the prospectus of a training institution, help establish respect and confidence in the institution.

- In the literature both the terms 'training objectives' and 'learning objectives' are used, the former are usually related to the responsibilities of the trainer, i.e. what will happen in the classroom, whereas the latter refer to the learner's expected behaviour after the training.

11) Refer to the chart with the 'systems approach'. Point out that with the preparation of objectives for all topics and courses, the 'planning phase' is completed and that it is now possible to present the curriculum for the training programme. The teachers now have a firm basis for their work in the classrooms. Discuss briefly whether it had been possible to start the design of training sessions without the preparatory steps we have discussed so far.

12) To conclude, ask some participants to guess what objective you had set up for this session.

Preparation of Objectives I

A   THE OBJECTIVE OF THE COURSE IS TO TEACH TRAINEES
        ABOUT PERCENTAGE CALCULATIONS.

B   THE OBJECTIVE OF THE COURSE IS FOR TRAINEES TO
        LEARN ABOUT THE PERCENTAGE CALCULATIONS THEY USE
        IN THEIR WORK.

C   THE OBJECTIVE IS FOR TRAINEES TO UNDERSTAND HOW
        CASH DISCOUNT CALCULATIONS ARE DONE.

D   THE OBJECTIVE IS TO ENABLE TRAINEES TO CALCULATE
        CASH DISCOUNTS ON SALES.

E   THE OBJECTIVE IS TO ENABLE TRAINEES TO CALCULATE
        CASH DISCOUNTS ON SALES WITHOUT THE USE OF A CAL-
        CULATING MACHINE.

F   THE OBJECTIVE IS TO ENABLE TRAINEES TO CALCULATE
        CASH DISCOUNTS ON SALES, QUICKLY AND ACCURATELY,
        WITHOUT THE USE OF A CALCULATING MACHINE.

G   THE OBJECTIVE IS TO ENABLE TRAINEES TO CALCULATE
        CASH DISCOUNTS ON SALES WITHOUT THE USE OF ANY CAL-
        CULATING MACHINE. A TRAINEE WILL BE CONSIDERED SUC
        CESSFUL IF HE COMPLETES THE FINAL TEST IN 15 MIN-
        UTES WITH FEWER THAN THREE ERRORS.

Preparation of Objectives II

THE OBJECTIVE OF THE TRAINING IS ...

A1   .. TO ENABLE TRAINEES TO UNDERSTAND AND APPRECIATE
        THE CO-OPERATIVE PRINCIPLES.

A2   .. TO ENABLE TRAINEES TO GIVE A SHORT SPEECH EX-
        PLAINING THE CO-OPERATIVE PRINCIPLES TO THE SATIS-
        FACTION OF THE MEMBERS OF THEIR SOCIETIES.

B1   .. TO ENABLE TRAINEES TO APPRECIATE THE ROLE OF
        THE CO-OPERATIVE UNION.

B2   .. TO ENABLE TRAINEES TO EXPLAIN THE ORGANISATION-
        AL STRUCTURE OF THE CO-OPERATIVE UNION TO DESCRIBE
        ITS THREE MAIN FUNCTIONS AND TO LIST THE SERVICES
        WHICH THEY, AS MANAGERS OF PRIMARY SOCIETIES, CAN
        DEMAND FROM THE UNION.

C1   .. TO ENABLE TRAINEES TO UNDERSTAND THE IMPORTANCE
        OF QUALITY CONTROL.

C2   .. TO ENABLE TRAINEES TO CONTROL THE QUALITY OF
        THE PRODUCE AND GRADE THE PRODUCE ACCORDING TO THE
        REGULATIONS OF THE MARKETING BOARD.

D1   .. TO ENABLE TRAINEES TO UNDERSTAND THE IMPORTANCE
        OF MOTIVATION OF STAFF FOR OPTIMAL JOB SATISFAC-
        TION AND PRODUCTIVITY.

D2   .. TO ENABLE TRAINEES TO IDENTIFY POOR PERFORMANCE
        AS A RESULT OF LACKING MOTIVATION AND TO SUGGEST
        WHAT ACTION THEY WILL TAKE TO INCREASE MOTIVATION
        AMONG THEIR OWN STAFF.

SESSION 2.6

IN-SERVICE PROGRAMMES

Objective: To enable participants to apply adequate tech-
              niques when preparing curricula for in-service
              training programmes.

Time: 2 - 2 1/2 hours.

Session Guide:

1)   Remind participants that up to now we have mainly dis-
       cussed pre-service training, i.e. the training given
       before the trainees take up their jobs.

2)   Refer to earlier discussions about 'career schemes'
       and 'training systems', which should be designed to
       take care of all the training needs in a co-oper
       ative. Point out the obvious need for other courses
       in addition to the pre-service courses. Ask partici-
       pants to suggest which type of courses might be re-
       quired, for which target groups and for what reasons.
       The following may be mentioned:

       -   Refresher courses may be arranged for managers who
           have already been trained. The reason may be to
           correct certain management deficiencies sometimes
           noticed by co-operative inspectors and auditors
           (such as problems with accounting or control sys-
           tems).

       -   Special courses may be needed to introduce new re-
           gulations (e.g. new credit procedures), or to
           train specific tasks which have not been given
           enough time in the pre-service courses (e.g. staff
           management and project preparation).

       -   Continuation courses may be arranged for those who
           have proved their competence for management to
           give them a chance to qualify for higher posts.

3)   Point out that it is the responsibility of the train-
      ing manager to continuously identify the need for 'in-
      service courses' of this type, and to plan and arran
      ge them when required – and before it is too late.
      The planning will follow the pattern of the systems
      approach we already have discussed, but we will now
      bring up one particular problem: that of making a
      'training needs analysis' and preparing curricula for
      refresher courses.

4)   Remind participants that the selection of training
      subjects and topics in a pre-service course is based
      on the job requirements. As the trainees have little
      or no experience their training starts from scratch.
      This implies that the curriculum is rather comprehen-
      sive in a pre-service course.

      Point out that the situation is different when design-
      ing an in-service course; the trainees have normally
      gone through a basic training programme, and have
      work experience. The goal is to improve their perform-
      ance and this can only be done by identifying the
      areas 'in which they need further training. It would
      be meaningless to offer training on matters they know
      already. Obviously, the 'training needs analysis' is
      more crucial, and more difficult, in this situation.

5)   Relate the following 'case' to participants:

      - There are about 20 smaller co-operatives in a par-
         ticular region and they all seem to have similar
         problems. Many suffer from losses and they can
         hardly survive. The members are not very loyal.
         Most of the society managers have considerable ex-
         perience, but their formal training was done long
         ago. They often fail to keep the books up-todate
         and take no action to improve the situation.

         The co-operative training director is aware of the
         situation. He has decided to take some action.

6)   Analyse the situation in a general discussion. Ask participants to suggest possible reasons and possible actions at this stage; elicit the following:

- There could be several reasons for a situation like this, such as lack of funds, insufficient business volume, member ignorance, poor management in general, lack of motivation among managers, etc.

- The problems cannot be solved unless the causes are identified.

- To identify the problems (and their causes), a joint effort by the people supporting the so- cieties is needed. Co-operative inspectors, consul tants and trainers should study the problems and suggest remedies.

- Training, if required, should be given on the basis of a proper training needs analysis.

7)   Tell participants that sometimes we hear statements like the following:

- "No, this is a question of credit and funding, training won't help."

- "What can the manager do, look at the resources he has..."

- "Don't blame the manager, the members there are simply not interested."

Ask participants what such statements seem to indi- cate:

- that the manager is competent, but these problems are outside his control, training will not change anything.

Ask participants who, if not the manager, should deal with these problems of making funds and resources

available and manage the operations so that all members become happy and interested. Point out that we sometimes hear another statement which seems to indicate that <u>all</u> problems can be solved through training:

-   "In a co-operative there is a job to be done, and someone has to be trained to do it."

The 'job' referred to here is the all-embracing one of 'running the society'; that job (of course) also includes making funds and resources available, etc. and it is through training that a manager can learn how to do just that.

As a conclusion to be drawn from these examples, caution participants to use the expression 'training won't help' with discretion.

8)   Return to the case related under Point 5 and the role of the training director in this particular situation.

9)   Remind participants about the previous discussions on techniques for analyses of jobs, trainees and training needs. Tell them to assume that in this case we already have job specifications and complete lists of job requirements for the managers. What remains to be done is to identify the problem areas and possible training needs in the target group.

10)   Ask participants what the training director should do to determine the training needs for this particular group of trainees.

Divide participants into groups of four to six members. Instruct the groups to elect a chairman and to discuss the question for 15 minutes, then report verbally which four or five methods they will recommend for analysis of the training needs. Tell participants

that they should all take notes, as anyone may be asked to do the 'reporting'.

11)   Use the following method for the reporting, when the groups have been reconvened:

A member from one group describes one method, how it is implemented, its pros and cons, etc. Other participants may comment and complement the description. Key words should be noted on the chalkboard. Then a member from the next group describes another method, and so on until all suggested methods have been described.

The following points should be mentioned during the presentation/discussion:

Interviews

- Managers, committee-members, and other people with insight into the affairs of the societies should be asked to identify the problems and suggest remedies.

- Interviews are time-consuming. Skilled and tactful interviewers are required.

Questionnaires

- Use the same respondents as for interviews.

- Questionnaires are a quick and cheap way of collecting information from many people.

- It is, however, difficult to prepare good questionnaires.

Member surveys

- Members can tell what is and what is not functioning in the society, through interviews and questionnaires.

<u>Observations</u>

- Co-operative officers, consultants and auditors may identify the weak points of management when they follow the work in the societies.

<u>Study of society books</u>

- The accounts, reports and minutes from meetings may reveal problem areas.

12) Discuss which one of the presented methods would be most suitable in this case. Elicit the suggestion that it is not enough to use one single method, it is safer to combine several of them.

13) Point out that it is not always possible to contact every person in the target group; ask participants how they would conduct a nation-wide survey taking in hundreds of trainees.

- Questionnaires could be used for the entire target group while interviews could be conducted with se- lected persons in the group. It is important to use reliable questionnaires which are pre-tested before they are distributed, and appropriate sta- tistical methods for the analysis of results. It is also necessary to apply appropriate sampling techniques for the selection of interviewees. It may be wise to use the services of specialists (such as statisticians and sociologists) in con- ducting such a survey.

14) Tell participants that studies have shown that pro- blem analyses of this type are often neglected or per- formed in a casual way, the reasons probably being all the work involved and the time factor. It happens that curricula are being based on the opinions of one single person, and no surveys are done. Point out that this is a risky method which should be avoided.

Tell participants that the 'nominal group technique' will produce a more reliable result than any one-man effort. This is a technique which is used to 'nominate' the problems that should be solved and it is based on many people's judgement, combined into one collective decision. Explain how the technique could be used to analyse the training needs of co-operative managers:

a) A **group** of people with very good knowledge about the managers' work are invited to a meeting.

   - The co-operative officers working in the actual area will form a useful group. The co-operative managers themselves could be invited to another meeting, etc.

b) A well defined **question** is presented to the group.

   - Examples of questions: 'What prevents a positive development of the co-operatives in your region?' 'Which are the main problems facing the co-operative managers at present?'

c) Group members **list** their answers in writing.

   - They are not allowed to talk to one another during this stage. Thus, they are free from group influence that could prevent them from presenting their ideas.

d) All the items listed by the group members are **presented** to the entire group.

   - The lists should be collected and all suggested items recorded on the chalkboard or flip chart Alternatively, group members will mention one item at a time, which is noted on the board, until all items have been recorded. Still, no discussion is allowed.

e) The list is _edited_.

- This involves a discussion in order to clarify the items, delete duplicated or overlapping items and to arrange the list in a logical way. At this stage there should still be no comments on the importance of the various items.

f) The items are ranked in order of _priority_.

- The group members are asked to select and rank, individually, the most critical problems from the edited list. They could, for instance, select 5 items and give 5 points to the most critical problem, 4 to the next one, and so on. Their rankings are then transferred to the main list and a final rank-ordered list can thus be calculated.

g) Finally, group members elaborate on the identified problems and give _examples_ from their experiences.

- These comments and examples may be useful in the forthcoming work (to design the training sessions) and should therefore be recorded or documented.

15) Arrange an exercise to give participants the opportunity to become familiar with the 'nominal group technique'.

Use the exercise to identify training needs for a co-operative target group which is well known to the participants. If this is not possible, apply the exercise on participants' own situation, and ask the question 'what prevents you from achieving maximum results in your training activities?' Follow the outline above when conducting the exercise. (The 'nominal group technique' can be used in other data collection situations, not only for training needs assessment.)

16)   Before concluding the session, ensure that all parti-
        cipants have written down the steps in the 'nominal
        group technique', as presented under Point 14 and in
        the exercise.

SESSION 2.7

PRESENTING THE COURSES

Objective: To enable participants to choose the most suit-
able forms for presentation of the curriculum
to all parties concerned.

Time: 1/2 - 1 hour.

Material: Examples of curricula, college prospectus and
similar documents from different training in-
stitutions.

Session Guide:

1)   Refer to the chart of the 'systems approach'; remind
participants that the tangible result after comple-
tion of the first four steps usually is a draft cur-
riculum document.

Point out that the curriculum provides the corner-
stone in the training system. The training manager
will plan all activities on the basis of this docu-
ment, the teachers will use it as a manual, and the
reputation of the training institute can depend great-
ly on the content of the curriculum.

2)   Let participants glance through a selection of docu-
ments containing descriptions of various courses of-
fered at various training institutions. Ask them to
note the difference in formats. Some have very brief-
ly worded descriptions of the courses - or just plain
listing of the subjects and topics included on the
timetables. Others may have detailed information con-
sisting of topics, hours of instruction, objectives,
description of contents, training methods, etc.

3)   Point out that training managers apparently have dif -

ferent ideas about the presentation of curricula. Tell participants that the purpose of this session is to discuss how a curriculum (and other information about the training) should be presented to best serve the information needs of trainees, teachers and all other persons involved.

4) Ask participants how they would like to structure this session. Elicit the suggestion that the following matters should be discussed, and in this order:

a) <u>Who</u> needs information?

b) <u>Why</u> do these groups of people need information?

c) <u>What</u> information do these groups need?

d) <u>How</u> should the information be presented?

5) Lead a discussion in order to reach an agreement on the above questions. Write key words on the chalkboard as the discussion proceeds, and build up a table as suggested on the next page.

6) Discuss the differences between the documents used internally in a college (such as specifications of objectives), and the "out bound" information (such as a college prospectus) with regard to presentation:

The former information is 'technical' like a blueprint, whereas the latter is promotional material and intended to 'sell' the college courses. Obviously, the dry and technical specifications of objectives are not suitable in a college prospectus, the courses should be described in a much shorter and simpler way.

WHO needs infor- mation?	WHY is it needed?	WHAT information?	HOW to present
Applicants, trainees	-To plan a career -To apply for courses -As reference during studies	-Entry con- ditions -Aims/con- tents of courses -Duration, dates, venue -Costs	-In a compre- hensive pros- pectus
Co-oper- ative managers	-To plan HRD* in their societies	-"-	-"-
Teachers	-To implement training according to plans	-Syllabi with objectives/ contents for each topic	-In a de- tailed curriculum document
Author- ities con- cerned	-To supervise and assess activities	-All	-Prospectus, curricula -Periodical reports -Plans
The gen- eral public .	-For various reasons	-As required	-Pamphlet with general info on the college, etc. -Otherwise as required

*HRD = Human Resources Development.

7)   Distribute to the participants a list of objectives
      and other basic data about a particular training pro-
      gramme. Choose, if possible, a programme in their own
      college, otherwise copy the syllabus for any subject
      included in MATCOM's 'Curriculum Guide', e.g. 'Market-
      ing of agricultural produce'.

      Instruct participants to rewrite the text so that it
      becomes suitable for a college prospectus. They should
      prepare a complete presentation of the actual course,
      including all the information they consider necessary
      for potential trainees.

Ask participants to do this as homework, and set a deadline for handing in the manuscripts.

8) When received, read through all the manuscripts, and give written comments.

Have some of the best manuscripts typed out. Use well-arranged (but different) layouts for the selected manuscripts.

Take time out during a later course day to complete this session – as outlined below in Point 9.

9) Return the manuscripts to participants and distribute copies of the typed ones.

Remind participants about the table produced in Point 5 above, and review the list of information required by applicants/trainees.

Ask participants to read through the selected examples, then ask them to assess them with regard to content, language and layout, taking the following points into account:

- Is all the required information included?

- Is there any excessive information?

- Is the aim of the course clearly explained?

- Is the course described in a positive, attractive and yet factual way?

- Is the language adjusted to the level of the target group?

- Is the layout well-arranged?

10) Let participants vote to select the best manuscript with regard to:

- a) contents,

- b) language,

- c) layout.

11)   Conclude by asking one participant to sum up the rea-
       sons why we should pay attention to the 'small' de-
       tails we have discussed in this session, like wording
       and layout of information to trainees.

       A good answer should refer to confidence and quality.
       It depends on the quality of our work whether we can
       create confidence in our training institution or not;
       we cannot deliver a quality output without quality in
       details.

topic

3

methodology — the basics

SESSION 3.1

THE METHODS

Objective: To enable participants to describe the most
               common methods used in management training.

Time: 1 hour.

Material: Handout 'A brief guide to teaching and train-
               ing methods'(Extract from ILO: TTMM, revised).

Session Guide:

1)   With reference to the 'systems approach' chart, point
       out that we have now reached the stage where there is
       a transfer of responsibility from the curriculum de
       velopment team to the individual trainer. If the pre-
       paratory stages have been properly completed, it will
       now depend on work in the classroom as to whether the
       objectives will be achieved or not, and usually it is
       left to the trainer alone to design the training
       sessions.

2)   Tell participants that many trainers find this task
       the most challenging part of their work. They look
       upon every training session as a product of their own
       creativity and skills and they always invest much
       more time in the design process and planning of a
       session than the actual 'delivery'. As in other cre-
       ative work it is not possible to learn from a manual
       how to shape a good product, but there is abundant
       literature on the techniques and methods which consti-
       tute the instruments in session design. The more we
       know about these matters, the better our chances of
       designing good training sessions.

3)   Point out that the most common training method is
       lecturing; for some teachers it is the only method,

whereas other teachers 'mix' lectures with other methods, like exercises.

Ask participants to estimate what percentage of the time in the classroom is used for lectures by teachers in various subjects. Note their suggestions on the chalkboard, the following figures may be typical:

Subject	Lectures	Other methods
Accounting	30%	70%
Management	70%	30%
Co-operative law	90%	10%

4) Let participants describe their own habits in the classroom, each one should tell:

- how much of the total time they use other methods than lecturing;

- which other methods they have tried, apart from lecturing, and give some examples.

Write all methods they mention on the chalkboard. Also ask for training methods which participants have not tried personally, but have some knowledge of. The discussion should result in the following list on the chalkboard:

- Lecture   - Role play

- Talk ('lesson')   - Case study

- Group discussion   - Business game

- Demonstration   - Study visit

- Reading assignment   - In-basket

- Application project   - Exercise

- On-the-job training

5) Give short examples, if necessary, and ensure that all participants know the general features of these methods. Do not go into details at this stage.

6) Ask participants to study the list on the chalkboard and suggest how the methods could be classified and divided into groups. There are several possibilities, elicit the following:

   I.   Where trainees are passive listeners /spectators as in lectures, demonstrations.

   II. Where trainees contribute and participate actively as in talks, discussions, exercises, case studies, role playing, in-basket, business games.

   III. Where trainees learn by doing as in on-the-job training and application projects.

7) Audio-visual materials or media are sometimes added to the list of methods. Explain the difference: a set of slides, for instance, is just a training aid used to complement some of the methods listed and not a training method in itself; the medium of television (video) is used to convey lectures, demonstrations, etc.

    Point out that the methods are often fused together, which makes it difficult to find proper terms for all possible activities. A case study, for instance, is often dealt with in a group discussion, and the in-basket method can be called an exercise. Point out that terminology is of secondary importance, it is more important to know how to use the various methods.

8) Therefore, considerable time will now be devoted to demonstrations and exercises on selected training methods. Review the timetable, and inform parti-

cipants about the contents of the coming sessions.

9)   Distribute the handout 'A brief guide to teaching and training methods'. Ask participants to study the first column as home work – in order to review the contents of this session. Check, the following day, if anyone wants further explanations.

A BRIEF GUIDE TO TEACHING AND TRAINING METHODS

WHAT IT IS	WHAT IT WILL ACHIEVE	POINTS TO WATCH
Lecture A talk given without much, if any, participation in the form of questions or discussion on the part of the trainees.	Suitable for large audiences where participation of the trainee is not possible because of numbers. The information to be put over can be exactly worked out beforehand - even to the precise word. The timing can be accurately worked out.	The lack of participation on the part of the audience means that unless the whole of it, from beginning to end, is fully unerstood and assimilated the sense will be lost.
Talk ("lesson") A talk incorporating a variety of techniques, and allowing for participation by the trainees. The participation may be in the form of questions asked of trainees, their questions to the speaker, or brief periods of discussion during the session.	Suitable for putting across information to groups of not more than twenty trainees. Participation by the trainees keeps their interest and helps them to learn.	The trainees have the opportunity to participate but may not wish to do so. Communication will then be all one way and the session will be a little different from a lecture.
Group Discussion Knowledge, ideas and opinions on a particular subject are freely exchanged among the trainees in smaller groups. The groups then present their "reports" and a concluding discussion is held in a plenary session.	Suitable where the application of information is a matter of opinion, also when attitudes need to be induced or changed. Trainees are more likely to change attitudes after discussion than they would after a lecture.	The trainees may stray from the subject matter or fail to discuss it usefully. Trainees may become entrenched about their attitudes rather than be prepared to change them.

WHAT IT IS	WHAT IT WILL ACHIEVE	POINTS TO WATCH
Role Play Trainees are asked to enact, in the training situation, the role they will be called upon to play in their job. Used mainly for the practice of dealing with face-to-face situations (i.e. where people come together in the work situation).	Suitable where the subject is one where a near-to-life practice in the training situation is helpful to the trainees. The trainees can practice and receive expert advice or criticism and opinions of their colleagues in a "protected" training situation. This gives confidence as well as offering guidelines.	Trainees may be embarrassed and their confidence sapped rather than built up. It can also be regarded as 'a bit of a lark' and not taken seriously.
Case Study A history of some event or set of circumstances, with relevant details, is examined by the trainees. Case studies fall into two broad categories: a) Those in which the trainees diagnose the causes of a particular problem. b) Those in which the trainees set out to solve a particular problem.	Suitable where a detached look at the problem or set of circumstances, free from the pressures of the actual event, is beneficial. It provides opportunities for exchange of ideas and consideration of possible solutions to problems the trainees will face in the work situation.	Trainees may get the wrong impression of the real work situation. They may fail to realise that decisions taken in the training situation are different from those which have to be made on-the-spot in a live situation.
Exercise Trainees are asked to undertake a particular task, leading to a required result, following lines laid down by the trainer. It is usually a practice or a test of knowledge put over prior to the exercise. Exercises may be used to discover trainees' existing knowledge or ideas before further information or new ideas are introduced. Exercises may be posed for individuals or for groups.	Suitable for any situation where the trainees need to practice following a particular pattern of formula to reach a required objective. The trainees are to some extent 'on their own'. This is a highly active form of learning. Exercises are frequently used instead of formal tests to find out how much the trainee has assimilated. There is a lot of scope in this method for the imaginative trainer.	The exercise must be realistic and the expected result reasonably attainable by all trainees or the trainees will lose confidence and experience frustration.

WHAT IT IS	WHAT IT WILL ACHIEVE	POINTS TO WATCH
Application Project Similar to an exercise but giving the trainee much greater opportunity for the display of initiative and creative ideas. The paricular task is laid down by the trainer but the lines to be followed to achieve the objectives are left to the trainee to decide. Like exercises, projects may be set for either individuals or groups.	Suitable where initiative and creativity need stimulating or testing. Projects provide feedback on a range of personal qualities of trainees as well as their range of knowledge and attitude to the job. Like exercises, projects may be used instead of formal tests. Again there is a lot of scope for the imaginative trainer.	It is essential that the project is undertaken with the trainee's full interest and co-operation. It must also be seen by the trainee to be directly relevant to his needs. If the trainee fails, or feels he has failed the project there will be severe loss of confidence on his part and possible antagonism towards the trainer. Trainees are often hyper-sensitive to criticism of project work.
In-Basket (In-Tray) Trainees are given a series of files, papers and letters similar to those they will be required to deal with at the place of work (i.e. the typical content of a manager's in-tray). Trainees take action on each piece of work. The results are marked or compared one with another.	Suitable for giving trainee managers a clear understanding of the real-life problems and their solutions. The simulation of the real situation aids the transfer of learning from the training to the work situation. A valuable way of obtaining feedback on the trainees' progress. Also useful for developing attitudes towards the work, e.g. priorities, customers' complaints, etc.	It is important that the contents of the in-tray are realistic. The aim should be to provide trainees with a typical in-tray. The marking or comparison of results must be done in a way which will not sap the confidence of the weaker trainee.

WHAT IT IS	WHAT IT WILL ACHIEVE	POINTS TO WATCH
Business Games Trainees, working in groups, are given the task of "managing" a particular business operation, which is simulated by providing trainees with background information on financial position, products, markets, etc., and current information on which they have to take action. The probable results of their decisions are calculated by an umpire and fed back to the groups. At the end a winner of the game, in tems of profitability, can be announced.	Suitable for giving trainee managers practice in dealing with management problems. The simulation of the real-life situation not only aids the transfer of learning but is necessary because a trainee manager applying only broad theoretical knowledge to the work situation could cause major problems. Also a valuable way of assessing the potential and performance of trainees. It helps considerably in developing many aspects of a managers's role.	The main difficulty is in assessing the probable results of the decisions made. The trainees may reject the whole of the learning if they feel the assessment of the probable outcome of their decisions is unrealistic. There is also a risk that the trainees may not take the training situation seriously.

SESSION 3.2

LECTURING

Objective: To enable participants to list the features of
               an effective lecture.

Time: 2 hours.

Material: Evaluation sheets: Lecturing and Discussion
               leading (From ILO-MATCOM manual 'Staff Manage-
               ment').

Session Guide:

1)   Refer to the talk in the previous session about parti-
       cipants' habits in the classroom; it probably re-
       vealed that they are quite used to the lecture
       method. Now ask them to describe how they work:

       - Do you write a complete manuscript for the lec-
          ture, or just an outline or some key words?

       - Do you rehearse the lecture?

       - How do you otherwise prepare?

       - How do you control the timing?

       - How do you deliver the lecture (with or without
          the manuscript, standing up or sitting down)?

       - How do you speak, formally or informally?

       - How do you begin the lecture, how do you conclude?

       - How do you present complicated matters?

       - How do you notice if the audience can follow you?

       - Describe any special tricks or practices of yours
          when lecturing?

       - How long are your lectures? Any breaks?

       - What do you find most difficult when lecturing?

       - What are your students' opinions about your lec-
          tures?

2)   Refer to the last question above. Ask participants if
      they ever have had any detailed assessment of their
      lectures, apart from standard course evaluations and
      polite comments from interested students. Do they
      know if as lecturers they speak loud enough and not
      too quickly, for instance. Point out that the only
      way to improve is to find out such things, and to
      practise, and that we will straight away have some
      exercises for that purpose.

3)   Ask for six volunteers who are willing to deliver
      two-minute talks to the rest of the group, each one
      will speak about one of the co-operative principles.

4)   Distribute lecture evaluation sheets to the other par-
      ticipants and ask them to fill in one after each spea-
      ker's performance. Do not show the evaluation sheets
      to the speakers.

5)   Ask each volunteer in turn to give his talk, do not
      allow them to exceed the two-minute limit. Collect
      the evaluation forms after each talk .

6)   When all the volunteers have delivered their talks,
      give them blank evaluation sheets. Discuss the import-
      ance of each of the criteria listed in the sheet and
      ask the speakers to comment on how they might have im-
      proved their talk. Ask participants for examples of
      good and bad performance by the speakers in order to
      demonstrate the significance of each criterion. Point
      out that a speaker may certainly be able to improve
      his lecturing if he is aware of these criteria.

7)   Ask for one more volunteer to give a two-minute talk
      about all the co-operative principles. Point out the
      advantage of having the previous speakers' informa
      tions as a source, but the disadvantage of knowing
      the evaluation criteria; if the speaker thinks too
      much about these, the spontaneity of the talk may be
      lost.

8)   After this final two-minute talk, ask the speaker to
      complete a self-evaluation and collect the filled-in
      evaluation sheets.

9)   Hand over all the filled in evaluation forms to the
      speakers. Give them a few minutes to read them.

10)   Explain that we will continue to use this form during
      the course when we practice lecturing, and that we
      may also give further comments verbally to those par-
      ticipants who wish so.

11)   Return to the questions in Point 1. on page 1. The
      short introduction may have shown that participants
      have many useful ideas about lecturing. Suggest a
      group work in order to produce a list of 'points to
      remember for lecturers', so that all can share the
      ideas and experiences.

      Divide the class into two groups. Instruct one group
      to work out a list of points to remember when <u>plan-
      ning</u> a lecture, the other group should do the same
      for <u>delivering</u> a lecture. Emphasise that they should
      deal with the <u>lecture</u>-method only, not a 'talk' or a
      discussion. The lists should be written on large
      paper sheets to be displayed in the classroom after-
      wards.

      Appoint a chairman of each group. Warn the group mem-
      bers that they should all take notes during the group
      discussion, and be prepared to present and explain
      the group's suggestions.

12)   Reconvene the groups after about 30 minutes. Select a
      spokesperson for each group, or ask the group members
      to select the spokesperson.

13)   Invite the spokesperson for the group which prepared
      a checklist on lecture planning to make the first pre-
      sentation.

14)   Invite the spokesperson for the other group and fol-
low the same procedure.

15)   Invite all participants to a discussion, giving their
comments about the lists. Elaborate on unclear items,
give further examples and make sure that everybody
'gets the points'. At the same time, do the necessary
'editing' of the list to have the items in a logical
order, and combined into one joint list.

Use the following list only for comparison to ensure
that no important points have been forgotten. If some
points have been missed, elicit them through question-
ing.

Lecture checklist

<u>Preparations</u>

- Know your audience.

- Know your subject.

- Know the objective of your lecture.

- Decide the sequence.

- Prepare an interesting opening.

- Make a draft, or note key words.

- Identify the difficult points, prepare explana-
  tions.

- Use job-oriented examples.

- Prepare a summary and conclusions at the end.

- Make a draft, or note key words.

- Rehearse.

- Time the various parts of your lecture.

- Plan when to have breaks.

- Plan how to use boards and flip charts.

- Plan the use of other equipment.

- Prepare the material needed.

In the lecture-room:

- Arrive in time, check facilities.

- Start punctually.

- Do not read from a manuscript, speak freely.

- Use everyday language.

- Speak loud, don't shout.

- Watch your manners, be yourself.

- Look at your audience.

- Endeavour variation in your performance.

- Write clearly on the chalkboard.

- Remember to take breaks.

16)   Point out that the list prepared by the groups consti-
        tutes a set of basic rules not only for lectures but
        generally for a trainer's performance. Inform partici
        pants that we will come back to several of the listed
        items during this course.

17)   Arrange to have the list that was formulated during
        discussion typed out and copied. Participants should
        each have a copy as soon as possible.

Evaluation - Lecturing

Lecturer: _____

Give points to the lecturer according to how strong you agree, or disagree, with the following statements:

4 points = I strongly agree
3 points = I moderately agree
2 points = I moderately disagree
1 points = I strongly disagree

----

1. The lecturer attracted my attention at the start.   ___

2. I could clearly hear everything he said.   ___

3. His language was easily understood.   ___

4. His voice was pleasant, not monotonous.   ___

5. His physical movements while speaking contributed to his talk.   ___

6. He appeared enthusiastic.   ___

7. He used his notes discreetly.   ___

8. His use of the chalkboard contributed to his talk.   ___

9. His use of other visuals contributed to his talk.   ___

10. The purpose of the session was clear.   ___

11. The session was well structured.   ___

12. I feel I learned something from the session.   ___

13. The timing of the session was perfect.   ___

14. The session ended with a clear conclusion.   ___

<u>Evaluation - Discussion leading</u>

Discussion leader: _____

15. The introduction was interesting and
    stimulated a discussion of the topic. |

16. The question to be discussed was
    consicely defined. |

17. The discussion leader created a re-
    laxed atmosphere for the discussion. |

18. He achieved all-round participation. |

19. His direct questions were evenly distri-
    buted among participants. |

20. His questions stimulated discussion. |

21. He did not pose as an expert. |

22. He never discouraged participants. |

23. He kept the discussion on the topic. |

24. He made competent intermediate summaries. |

25. He delivered a good final summary. |

SESSION 3.3

BASIC LEARNING PRINCIPLES

Objective: To enable participants to point out the limita-
               tions of the lecture method, and to explain
               the basic principles of learning.

Time: 1 1/2 - 2 hours.

Material: Handout 'What is true about lecturing?'

Session Guide:

1)   Tell participants that the purpose of this session is
       to take a closer look at the lecture method and to
       discuss some of 'the mysteries of learning'.

       Distribute the handout. Give participants about ten
       minutes to read through it and write their comments.

2)   Conduct a discussion on the basis of the handout, as
       outlined below. During the discussion the following
       learning principles will be mentioned:

       -   Sequencing/structuring.

       -   Motivation.

       -   Transfer.

       -   Individual approach.

       -   Feedback.

       -   Active involvement.

       -   Repetition

3)   Begin by asking participants   what they like most
       about the lecture method.

       -   They may possibly refer to Item E on the handout
           and correctly suggest that the teacher is in full

command when using the lecture method. Contents,
sequence, presentation and timing can be exactly
planned, and the risk of 'anything happening' to
confuse the learning situation is minimal.

Discuss why this factor is important. Stress the obvi-
ous fact that it is easier to understand and remem-
ber things which are presented in a logical order (se-
quence); explain that this is a basic 'learning prin-
ciple'.

Write the heading 'Learning principles' and the first
item ' <u>Sequencing/structuring</u>' on the chalkboard.

4)   Use an example, for instance the topic 'Meeting pro-
cedures', and elicit through questions the following
aspects on sequencing the subject-matter contents:

-   It is easy to create good sequencing in a lecture,
    demonstration or instructional text about meeting
    procedures.

-   The sequencing can not be fully controlled when
    trainees are more actively involved , as in case
    studies or role plays (e.g. if they 'act out' meet-
    ings for purposes of practice).

-   A logical sequence may not necessarily be the best
    one in a training situation. (For example it is na-
    tural to see first what the by-laws say about com
    mittee meetings, but this would not be a very ex-
    citing start of a training session.)

Tell participants that 'sequencing' will be discussed
further in a later session.

5)   Remind participants about a teacher's task and res-
ponsibility: not to teach, but to see to it that
trainees learn. He must design his sessions so that
learning will take place and he must therefore know
the principles which make learning possible. Refer to
the handout again and ask for other ways to help

trainees to learn and remember.

6)   If the participants mention item F 'To listen and
        learn, you must be interested' or item L 'A lecturer
        should state the objective of his lecture' in the
        handout. Add the word 'motivation' to the list on the
        chalkboard and discuss the meaning and implications
        of this principle:

        -   Research has shown that people must be interested
            and motivated in order to learn. Adults, especial-
            ly have problems in learning if they do not see
            the need and purpose of the training.

        -   The motives for learning vary, of course. Young
            people want to pass an examination and get a job,
            older people want more knowledge which can help
            them to do a better job.

        -   Teachers can motivate interest in a subject or a
            session, e.g. by explaining the objectives and pur-
            pose of each training activity, by making use of
            an interesting opening to the lecture, etc.

        Tell participants that we will come back to the ques-
        tion of motivation and how to make trainees interes-
        ted in our training.

7)   Refer to the problem mentioned above about adults' mo-
        tives for learning, and to item D 'Examples from real
        life help to keep the audience awake' in the handout.
        Emphasise the importance of job-oriented training;
        most adult learners enrol in a course because they
        want to learn something which is useful and which
        they can 'transfer' to their jobs. If they do not see
        any possibility to apply what they learn, they may
        consider the training wasted time. If this happens
        they cannot build up any interest in learning.

        Add the word 'transfer' to the list of learning prin-
        ciples.

8) Discuss if trainees can transfer what they learn through lectures to their jobs in the co-operatives.

    -   This depends on the contents and the skills of the lecturer. A lecture on 'accounting procedures' would make little sense, but demonstration and exercises would help the trainees to transfer the knowledge to their jobs. A lecture on 'co-operative leadership' may have some effect on the trainees'jobs, but very few lecturers are so fascinating, convincing and influential that they can induce us to change our attitudes (Item B). A problem-solving exercise or a case study would be much closer to reality than a lecture, and therefore easier to transfer.

    -   Generally speaking, lecturing is not a very suitable medium for job-oriented training. The closer the training situation and content is to the real job, the easier the chances will be of 'transfer'.

9) Ask participants to think about teachers they had during their school years. Ask some to tell about teachers (and specific lessons) which they have nice memories of, and to try and identify why they still remember them.

    They may mention three aspects:

    a) the teacher paid attention to them, as individuals;

    b) he gave them credit for their achievements;

    c) students were actively involved, not only listening.

    Write these three principles on the chalkboard:

    -   individual approach;

    -   feed-back;

    -   active involvement.

10)   Explain the importance of an ' <u>individual approach</u>'.
        Point out that even in a homogeneous class there are
        differences, some trainees will need more time and
        more explanations than others to appreciate the mess-
        ages. A lecturer's problem is reflected in item M
        'The lecturer will never know if the message is un-
        derstood by all or a few, or by nobody', in the hand-
        out; he is talking to 'an audience', not to indivi-
        dual trainees, and no time is provided for individual
        instruction.

        Participants may suggest that a lecturer can use ques-
        tions to find out if the audience can follow him. Dis-
        cuss the value of a general question such as 'do you
        understand?'. The most common answer to this question
        is silence. What does it indicate?

        Point out that the talk-method (lecture with ques-
        tions and short discussions) is a step closer to an
        individual approach. Point out that you are using the
        talk-method right now. When you notice that something
        is   unclear, you will give more explanations and
        examples so that everyone will understand. Point out
        that your problem is to create a climate in the class
        so that everyone feels free to talk and won't be em-
        barrassed to 'ask stupid questions'.

        Tell participants that we will come back to the tech-
        nique of using questions in a later session.

11)   Explain the meaning of ' <u>feedback</u>' in an educational
        context using your present situation as an example:

        -   You try to get the participants an 'active' part
            of the lecture. When they ask a question or give
            an answer you will react in some way or other,
            e.g. give some comments. This reaction is a ' <u>feed-
            back</u>' to the participant.

        -   The feedback confirms to the participant that he
            is 'learning something'.

- Research has proved that feedback is important in learning situations. It reinforces the learning. Effective learning may not take place without feed-back.

- There are many ways of providing feedback to trai-nees: short comments, discussions, compliments, personal attention, marks on written test, etc.

- Feedback should be given without delay, otherwise it will not be effective.

- A teacher cannot give any feedback to trainees un-less he first receives feedback from them. He will have feedback in different ways: through their an swers and questions, tests, or simply by observing the reactions in the class.

Ask participants to comment on the possibilities of giving feedback in a lecture situation. They may re-fer to Items A, M and N and correctly suggest that there is no feedback at all in a lecture. Point out that some other methods, such as discussions and role plays, will provide immediate and frequent feedback.

12) Remind participants about the role of the trainees during a lecture; they are passive receivers of infor-mation. Point out that we easily forget what we hear; refer to the Chinese proverb: 'What I hear I forget, what I see I remember, what I do I understand'.

Explain that many studies have been made to prove the validity of the proverb. Different figures have been presented – the following being one example (although it should not be taken as 'gospel' of course).

We retain –

    20% of what we hear
    40% of what we see and hear
    70% of what we see, hear and do.

13) Ask participants what such figures and studies mean

to a trainer. Possible suggestions:

- The lecture method is, generally speaking, not very effective.

- The effectiveness of a lecture will improve if we use supporting visuals.

- Instead of 'pure' lecturing we should apply the talk-method or lectures with discussions and other activities whenever possible.

- Whenever possible, we should substitute 'participative methods' for lectures, and let the trainees be <u>actively involved</u> in the learning activity.

14) Tell participants that we will deal with those methods in later sessions.

15) Ask participants to mention other ways of reinforcing learning. Elicit '<u>repetition</u>' and add it to the list on the chalkboard.

   Ask the participant who suggested repetition to give a resume of the learning principles now listed on the chalkboard, as a first repetition.

16) Ask participants if you have managed to apply any of the learning principles during this session. Take them one by one:

- Did you <u>structure and sequence</u> the material properly? (Refer to the list of principles on the chalkboard.)

- Did you manage to create an <u>interest</u> in the subject? (In the beginning of the session you explained the purpose of the session, and you used some challenging statements, presented in a handout).

- Was the session job-oriented or far from reality; can the learning be <u>transferred</u> to the jobs? (The

session dealt with key problems in the 'participants' work.)

- Did you apply an <u>individual approach</u>? (This was a lecture with talk, and only some of the participants may feel that they got enough attention?)

- What about <u>feedback</u>? (You gave comments to all questions and answers, was it enough?)

- Were participants <u>actively involved</u>? (You had them read, think, ask questions, answer questions and to discuss. Was it enough?)

- What about <u>repetition</u>? (A summary was made, more to come later.)

Emphasise that you made an effort, but only the participants can judge whether you were successful. If they tell you where you failed, you may improve.

17) To conclude, let some participants read the comments they have written in the handout. Discuss items as required.

What is true about lecturing?

What are your comments to the following statements? Mark
your opinion in the chart. Use words like the following:
True, Not true, Improbable, Maybe, Nonsense, Indeed?

A   Lecturing is a one-way communi-
       cation method.   _____

B   A good lecturer can change the
       attitudes of his audience.   _____

C   A lecture should begin with a
       joke.   _____

D   Examples from real life help to
       keep the audience awake.   _____

E   The lecturer can exactly plan
       the course and contents of his
       lecture.   _____

F   To listen and learn, you must
       be interested.   _____

G   People cannot listen attenti-
       vely for more than a few minu-
       tes.   _____

H   Lecturing is a suitable method
       for large audiences.   _____

I   Lecturing is like transferring
       words from one paper to another
       paper without passing any brain.   _____

J   Trainees could as well be given
       the lecturer's manuscript to
       read. Cheaper. More effective.   _____

K   Most teachers are excellent
       lecturers.   _____

L   A lecturer should state the
     objective of his lecture   _____

M   The lecturer will never know if
     his message is understood by all
     or a few or nobody.   _____

N   Questions from the audience will
     interfere with the lesson plan.   _____

O   People sleep better during lec-
     tures if the lecturer speaks in
     a monotonous voice.   _____

SESSION 3.4

MOTIVATION AND SEQUENCING

Objective: To enable participants to apply rational prin-
              ciples when deciding the sequence of the ma-
              terial to be dealt with in a training session.

Time: 1/2 - 1 hour.

Session Guide:

1)   Remind participants about one particular advantage of
      the lecture method; it is easy to present the subject
      matter in a certain, planned sequence. Stress that
      the sequencing has importance both for the motivation
      of trainees and for the perception of new material,
      and a teacher should therefore always try to arrange
      his material in the most effective order.

2)   Remind participants about Session 2.7, Point 4, when
      they were asked to suggest a proper structure of the
      session. Tell participants that you will now give
      some more examples to illustrate the problems of
      sequencing.

      Begin with the topic 'committee meetings' which was
      used as an example already in the previous session,
      Point 4.

      Display the following items (ohp or flip chart) which
      are usually included when committee members are trai-
      ned on meeting techniques.

      -   Legal requirements.
      -   The purpose of a committee meeting.
      -   Calling a meeting.
      -   The agenda of a committee meeting.
      -   Proceedings.
      -   The role of the chairman.

- The role of the secretary, the minutes.
- Practical exercises, simulations of meetings.
- Follow-up of meeting decisions.

3) Point out that this sequence is quite natural, the steps lead logically from one to another and this will certainly make learning easier for the trainees. Ask participants if they can envisage any problems if using this sequence.

Elicit the problem of motivation. It may be difficult to create an immediate interest for the topic when we begin with a study of the legal requirements, the purpose of meetings and similar theoretical aspects.

4) Remind participants that a practical, job-oriented approach is better for the purpose of creating an interest in the topic. Discuss how such an approach could be applied to 'committee meetings'. one example is outlined below.

- Trainees could immediately be asked to simulate a short committee meeting; they could be briefed to play different roles, and two or three of them should be instructed to act and argue in such a way that an agreement and decision would not be reached.

- After this experience the trainees would probably appreciate the importance of correct meeting procedures and feel motivated to learn and practice. The training could then follow the logical outline, but the two first points might be integrated in the following items.

5) Point out that it is often tempting to begin with 'theory', for instance a definition, when teaching about certain managerial and economic concepts. Many teachers would, for instance, explain the co-operative concept of 'patronage refund' by first giving a

definition, such as . 'Patronage refund means that any surplus should be returned to the members in strict proportion to the business each one has done with the society.'

6) Ask participants how trainees would react to such an opening statement.

    -   The definition is theoretical in nature and most trainees would not be able to immediately see the practical implications.

    -   The 'dry' definition would not fill trainees with interest and would not create any motivation for the coming session.

7) Ask participants to compare such a theoretical approach with a job-oriented practical approach like the following, where we begin with something simple which the trainees can easily grasp:

    -   First we describe to our trainees the real situation in one co-operative society at year's end: when- all expenses have been paid and money reserved for investments and education there is still some money left over (a surplus or profit).

    -   We discuss how this profit would be used in a private business: the owners share it among themselves in relation to how much money they have invested.

    -   Now we present the problem to our trainees: What should we do with the surplus in the co-operative? It also belongs to the owners (the members) but how should it be divided? In the same way as in a company? Give the same amount to every member? More to the poorest? More to the oldest members? What is the 'co-operative' solution to this problem?

8)　　Emphasise that the suggested approach is completely different from the 'theory-approach'. Here, again, we challenge the trainees with a real, practical problem which they will all have in their jobs: they will become curious and feel the need to learn. They will not be discouraged by the confrontation with an abstract definition. The trainees may feel that they themselves have discovered the concept of 'patronage refund'.

9)　　Display the following points on the ohp or flipchart:

A　Why is a member register needed?

B　Exercises on maintaining a member register.

C　Which data should be included?

D　How to set up and maintain a member register.

E　What is a member register?

F　Legal requirements.

Explain that one teacher decided to include these teaching points in his session on 'co-operative member registers'. The points are here listed in random order.

Ask participants to discuss in beehive groups for five minutes which sequence would be the most effective.

10)　　Ask each group to report their suggestions, and note them on the chalkboard.

Ask for arguments for the suggested sequencing, particularly for the choice of the starting point. Let groups with differing ideas explain their reasons. There is, of course, no definite best sequence. The following aspects may be considered, however:

-　If we want a 'practical' approach we should not begin with points A, E and F.

- If trainees already know that they must keep a member register in their societies they may also be motivated to learn about it, and therefore it may be relevant to begin directly with Point D.

- Point D will include the answers posed in points C and E, no need to deal with them separately; likewise point B will also illustrate point A.

11) Refer to previous discussions and ask participants to sum up the basic rules for sequencing:

- The units in a sequence must logically 'hang together'.

- Move from the simple to the complex and from the known to the unknown.

- Begin by making trainees curious, interested and motivated to learn, for instance by presenting a job-related problem. Avoid theories and definitions in the beginning of a session.

SESSION 3.5

USING QUESTIONS AND DISCUSSIONS

Objective: To enable participants to facilitate learning
                during a training session by using questions
                and short discussions in a meaningful way.

Time: 1 hour.

Session Guide:

1)   Repeat again the fact that learning will be more ef-
        fective when trainees 'participate', and that the
        easiest way of involving the trainees in a session is
        to use questions. Point out that questions are, in
        fact, at the very core of the learning process.

2)   Tell participants that we will now take up some as-
        pects of questioning. With reference to the previous
        session, ask them to suggest how they would like to
        structure the session; which matters to discuss and
        in which order. Elicit suggestions from participants
        on the following questions:

        -   Why ask questions?

        -   How to ask questions.

        -   How to deal with the answers.

        -   How to deal with questions from the trainees.

3)   Lead a discussion on the above mentioned aspects. En-
        sure that the points listed below are mentioned. Use
        the examples to elicit participants' views, or to il
        lustrate what they suggest. Note key words on the
        chalkboard and remind participants to take notes dur-
        ing the discussion.

4)   <u>Why ask questions?</u>

- To promote 'participation', individual thinking.
  (e.g. What does this figure indicate?)

- To provoke discussion. (e.g. Which price policy is
  suitable in this situation?)

- To receive and be able to give feedback, to rein-
  force learning. (Note, however, that to ask ques-
  tions for the sole purpose of checking or testing
  the trainees does not produce positive results,
  the time can better be used for 'good' and *meaning-
  ful* questions.)

- To draw on trainees' experiences. (e.g. How have
  you done transport scheduling in your society,
  Johnson?)

- To break the ice for silent trainees. (e.g. Have
  you any ideas about this, Shyman?)

5)   <u>How to ask questions.</u>

- Make effective use of questions. (A good question
  is 'a powerful tool, just as important as the
  answer. So do not 'waste' your good questions by
  throwing them out without consideration.)

- Put the question to the whole group, but each
  trainee should feel that the question is for him.

- Appeal to a specific individual for an answer,
  when you have presented the question. (e.g. Who
  should actually write the annual report, Johnson?
  Not: 'Johnson, who should write the annual re-
  port?')

- Ask for causes, reasons, explanations. (e.g. Why
  is the annual report prepared? Give me three rea-
  sons for preparing a balance sheet.)

- Spread your good questions to as many as possible.

- Avoid yes/no questions. (e.g. Should the manager
  write the report?)

- Avoid leading questions. (e.g. Don't you think
  that the manager should at least prepare a draft?)

6)   How to deal with the answers.

- Give time for the answer. Use silence as a weapon.

- Listen carefully to the answer.

- Do not repeat the answer given.

- Never ridicule a trainee's answer or suggestion.

- Do not 'judge' the answer and tell what you think
  about it. Instead make use of it in the learning
  situation, give follow-up questions and elaborate
  further, involving the other trainees. (e.g. - Who
  should prepare the annual report? - The Committee.
  - Why can't the manager do it? - etc.)

7)   How to deal with questions from the trainees.

There are two possibilities:

- The teacher answers straight away. This is suit-
  able only when someone asks for dry facts. (e.g.
  How many co-operatives are there in our country?)

- The question is used to further activate the train-
  ees. This can be done by redirecting the question
  to the other trainees, giving a counter-question,
  starting a discussion, asking for the experience
  and opinions of the other trainees, etc.

8)   Point out that the methods described here are not
  used by the traditional lecturer, who sees himself as
  a 'source of knowledge', and does not see the need
  for questions and discussions. Even for a modern ma-
  nagement trainer it is often difficult to resist the
  temptation to 'tell' the trainees everything he knows
  and believes in, instead of using questions to let
  them see all sides of every issue and letting them
  use their own judgement - as they will have to do in

their jobs.

9) Refer to the four aspects mentioned in the beginning
of this session, and ask some participants to review
their notes and mention any point on which they think
they can improve their questioning technique.

10) Point out that this session has actually been an exam-
ple of 'using questions', and a discussion. The alter-
native would have been to let participants passively
listen to a lecture, but now they were asked to con-
tribute themselves, and it is likely that they will
remember most of the points discussed.

11) Ask participants to describe the role you, the trai-
ner, have had during the session:

- to be a 'discussion leader' and a participant in
the discussion, like the other participants, but
not a lecturer.

12) Ask participants to identify the main tasks of a dis-
cussion.leader:

- to introduce the topic to be discussed in such a
way that participants are interested and motivated
to take part in the discussion;

- to encourage everyone's participation, encourage
the 'silent ones' to take part and control the
over-talkative;

- to ensure that each contribution is understood by
all participants;

- to keep the discussion on the subject;

- to make summaries of the discussion at appropriate
times, and at the end.

13) Ask participants to assess your performance as a dis-
cussion leader by filling in the evaluation sheet
(same as used in Session 3.2, Sheet 4 reverse side).

14)   Warn participants that some of them will later in the
        course have the opportunity to practice leading dis-
        cussions.

15)   To conclude, point out the importance of the seating
        arrangement in the classroom. A discussion becomes
        very difficult and artificial if participants do not
        see the faces of their partners. Ask participants to
        suggest possible alternatives to your present arrange-
        ment. Examples:
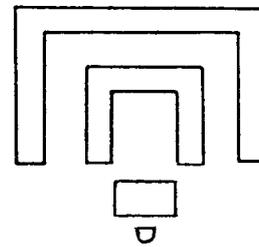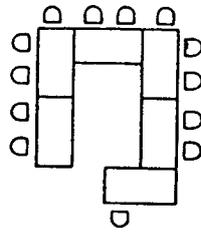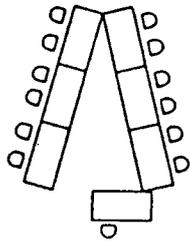
SESSION 3.6

CREATING VARIATION

Objective: To enable participants to activate the train-
               ees and create variation in their training
               sessions by using 'bee-hive discussions' and
               'brainstorming'.

Time: 1 hour.

Session Guide

1)   Refer to the discussions in previous sessions about
       the shortcomings of the lecture method. Remind par-
       ticipants about the importance of creating variation
       in activities and the fact that learning is rein-
       forced if the trainees are actively involved, rather
       than remaining passive listeners.

       Point out that you have tried to apply some 'activat-
       ing' methods in this course, apart from asking ques-
       tions. Remind participants of the listing of the many
       tasks of a trainer - which was a sort of 'brainstorm-
       ing'- and the 'bee-hive discussions' on the 'systems
       approach' carried out in the very first session
       (Session 1.2, Points 3 and 9). These are examples of
       two different methods to 'activate' a class, which we
       shall now take a closer look at.

2)   Explain the meaning of 'brainstorming: to quickly pro-
       duce a lot of ideas. These ideas may be clever or stu-
       pid or crazy, it does not matter, everybody should
       contribute with anything and everything that comes to
       the mind.

3)   Demonstrate how to lead a brainstorm exercise.

       Tell participants that they will get a question. They
       must then really let themselves go and not feel inhi-

bited. Any answers are welcome and they should simply
shout them out without waiting for your sign or their
turn.

Explain that the first question is intended just to
warm up. Choose a question which provokes the imagina-
tion, e.g. show a paperclip and ask 'What can this be
used for?' Urge on participants to answer quickly,
and interrupt when ideas seem to diminish.

4)   Then give a serious question, e.g.:

   -   How can we improve our working conditions here at
       the college? or

   -   How can we improve student life on the campus?

Write all suggestions shouted by participants on the
chalkboard. Write quickly and use abbreviations in or-
der not to slow down the tempo. Encourage partici-
pants to produce as many ideas as possible.

5)   When the suggestions come to an end, explain that the
     first step of the exercise has been completed. The
     next task is to evaluate the ideas.

6)   Go through all the suggestions. Do not dismiss any-
     thing without discussion, even if it at first seems
     unrealistic. Delete an item only when all agree to do
     so. Prepare a new edited list comprising realistic
     ideas only.

7)   Discuss the remaining items with the purpose of selec-
     ting the best ones. Try to reach an agreement on a
     final list of serious and feasible suggestions; it
     should be possible to actually use the list as a
     basis for a proposal to the college authorities.

8)   Point out that most of the learning principles are
     applied in an exercise of this type, particularly
     active involvement, quick feedback, motivation and

transfer. When dealing with real management problems, the exercise is truly job-oriented.

9)   Remind participants about the more quiet bee-hive discussions, and review how it was organised in previous sessions:

- The trainer presents his questions. It should not be a very complicated question, not one with a definite answer but a question that requires some thinking before an opinion is expressed.

- The trainees are asked to exchange their views on the question in small groups, formed quickly by three or four people sitting close to each other. Only a few minutes (three to ten) should be allowed for the discussion, which must be in low voice (the sound of a bee-hive, hence the name).

- After the discussion the groups report their opinions to the teacher, it is not necessary that they reach an agreement on the issue.

- The teacher uses the groups' answers as feedback, he continues (and concludes) his treatment of the question on basis of the groups' answers.

10)   Ask participants to identify the advantages of the bee-hive method:

- All trainees play an active role. In a small group it is not easy for anyone to be passive, everybody's opinion is needed.

- It is quick and easy to implement a bee-hive discussion.

- Most learning principles are applied.

11)   Display the following points to participants (using the chalkboard, flip chart or ohp):

A What is the role of the Co-operative Bank?

B   Explain the role of co-operative credit.

C   Outline an effective credit system.

D   Which are the best loan securities? Why?

E   How to deal with loan defaulters?

12)   Tell participants that they are not going to find the
      answers to these questions, they should judge only
      which of them would be suitable for a five-minutes
      beehive discussion. And this they will do together in
      bee-hive groups.

13)   Instruct and show how to form small groups of three
      or four members with a minimum of movement of chairs.
      Then repeat the assignment: Select the item(s) which
      can be discussed in bee-hive groups. Allow five min-
      utes for discussions.

14)   Interrupt the discussion and reconvene the partici-
      pants in their usual seating arrangement.

15)   Ask each group to report; tick off their choices
      against the items listed on the chalkboard.

16)   Discuss the items, one by one. Ask the group which
      has selected the item to give their reasons. Elicit
      the following:

      - A.   Nothing to discuss. The role of the bank is cer-
              tainly defined in the statutes and the purpose
              of the discussion is not to challenge this.

      - B.   This can indeed be discussed. But the question
              is too 'big' for a short discussion. The ques-
              tion 'Mention two reasons for co-operative cre-
              dit services' would be more appropriate.

      - C.   Suitable for group work, but not for a quick
              bee-hive discussion. More time to answer the
              question would be needed.

- D.   Suitable. Trainees have only a few alternatives to choose from, and they can all present their views and together make a quick assessment in their groups.

- E.   Same as C.

17)   Sum up and emphasise the importance of discrimination and planning even when choosing 'simple' methods like these; a badly chosen or formulated question for a brainstorming or bee-hive exercise may mean nothing but a waste of time.

SESSION 3.7

VISUAL SUPPORT

Objective: To enable participants to make effective use
              of chalkboards and flip charts during training
              sessions.

Time: 1 hour.

Material: Partly prepared chart (poster).

Session Guide

1)   Ask a participant to explain how the co-operative move-
      ment is organised, or anything else that is difficult
      to explain without the help of some simple illustra
      tions (e.g. the rules of cricket, football, table-ten-
      nis, how to make a kite, etc.).

      In all probability, the speaker will make use of the
      chalkboard; if not, complain that you cannot under-
      stand fully, and the other participants will certainly
      urge the speaker to use the board. Interrupt after a
      while, and point out that an important principle has
      been proved; it is easier to explain, and easier to un-
      derstand and learn if we make use of visual aids.

2)   Ask participants to recall what was said at a particu-
      lar occasion earlier in the course; they may already
      have forgotten the details of what they only <u>heard</u>.
      Ask participants to recall some details which were
      presented on the chalkboard or the ohp in a previous
      sessions; point out that they seem to easily remember
      what they have <u>seen</u>. Emphasise this additional reason
      for using visuals: we remember better what we see
      than   what we just hear.

3)   Tell participants that many trainers have the bad hab-
      it of making careless illustrations, and seem to use

the chalkboard in a haphazard way. Tell them that you
will demonstrate this 'misuse' of a trainer's most use-
ful tool.

4) Give a short (3 minute) lecture on any topic of inter-
    est, and use the chalkboard continuously for support-
    ing text and illustrations, but do it in a very unor
    ganised way. As an example, the topic "Member involve-
    ment in a housing co-operative" could be presented as
    follows:

    -   The board of directors has set up an advisory coun-
        cil consisting of five members who meet once a
        month. Each council member is chairman of a spe
        cialised committee and responsible for the follow-
        ing activities: co-op studies, clinic, nursery,
        sports and other social activities.

    -   When completed, the poor illustration on the chalk-
   board may be something like this:
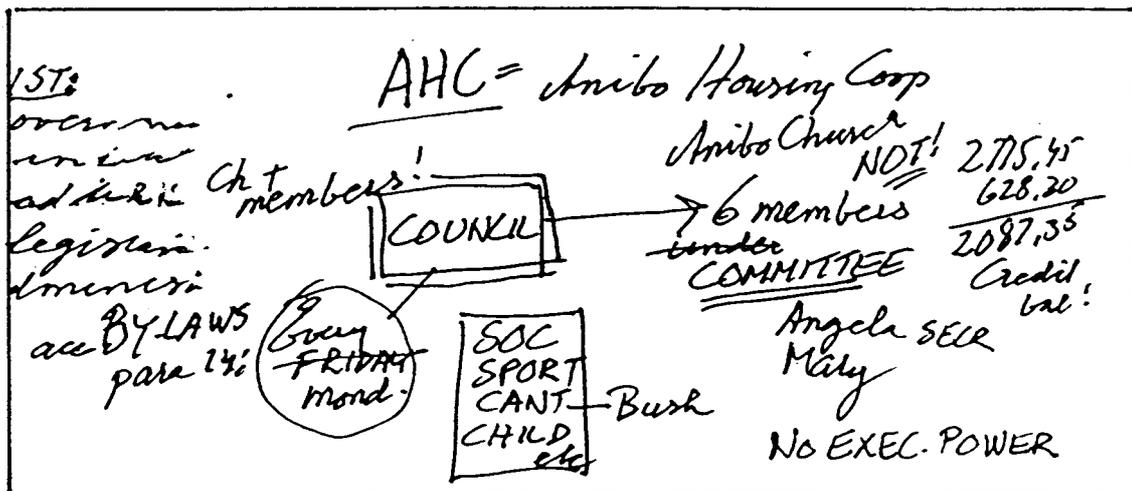
5) Ask participants to tell what mistakes you did in your
    short presentation. They should mention that:

    -   the illustration is very confusing, the layout was
        obviously not planned;

    -   some words are not legible, too small or poorly
        written;

- you turned your back to the class and 'talked to the chalkboard' most of the time;

- the board was not clean when you started the presentation, you used the eraser unsystematically.

6) Point out that an illustration of this type is of no value in a learning situation; it only leads to confusion. Ask participants what the reasons could be for trainers to use the chalkboard in this way:

- they may not have planned their lecture at all;

- they may not know the learning principle of 'sequencing/structuring', which should be applied also to pictures, charts and text on the chalkboard;

- they may not feel capable of making simple drawings.

7) Emphasise the importance of planning even simple presentations, and that the preparation of simple visual aids does not require any particular skills, as the following example will show.

Present again the mini-lecture, but the supporting visual used this time should be partly prepared in advance, so that a nice clear illustration will develop during the lecture. For the topic "The housing co-operative" the final chart might look like this:
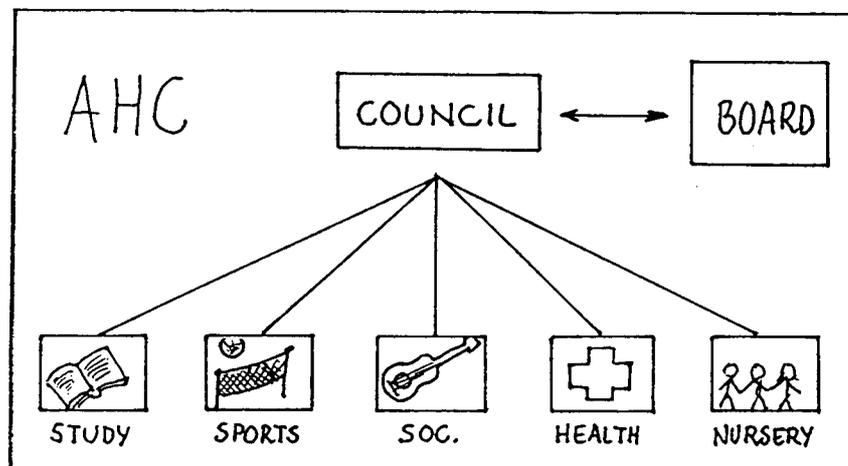
-   The basic structure of the chart could be drawn in advance, e.g. on a flip chart sheet, and only the symbols and the words need to be filled in during the lecture. Alternatively, the whole chart could be outlined in faint lines, visible only to the trainer, to facilitate completion during the lecture.

8) Emphasise two other advantages of preparing a chart in advance, partly or fully, which are: (a) expensive classroom time is saved, and (b) the trainer need not turn his back to the class all the time.

9) Ask participants to comment on the layout of the chart. Is it clear enough? Is the size appropriate? Is there too little or too much text, considering the in formation conveyed through the lecture? Finally discuss the value of a complementary visual like this one, does it contribute to understanding; does it facilitates learning?

10) Remind participants about the co-operative principles; list the key words on the chalkboard if necessary. Ask them to think about possible ways of illustrating these principles. Allow some minutes for individual thinking and drafting, encourage the use of symbols and 'stick people'. Then ask anyone to come up to the chalkboard and illustrate a selected co-operative principle, the other participants may guess which one. Let others try in the same way and fill the board and flip charts with sketches.

    Discuss the sketches (some examples on the next page). Point out that ideas and creativity mean more for the result than the actual drawing skill.

    Tell participants that they will get more opportunities to practice preparation of visuals in later sessions and assignments.
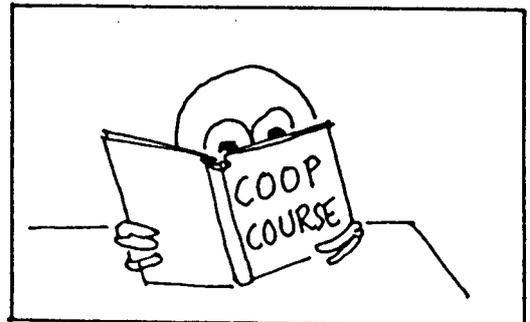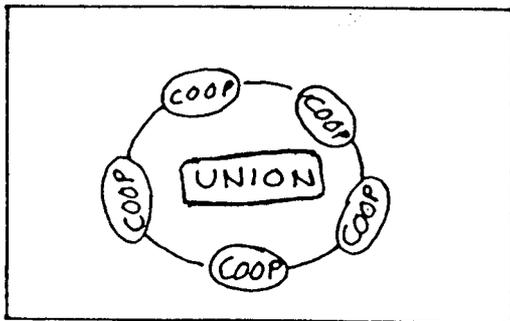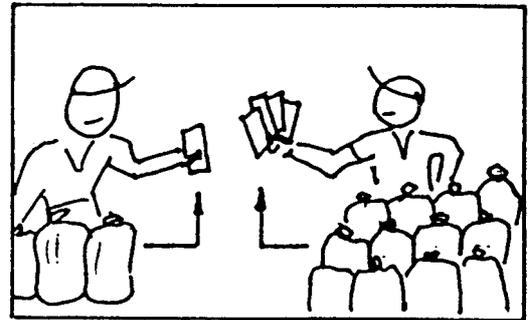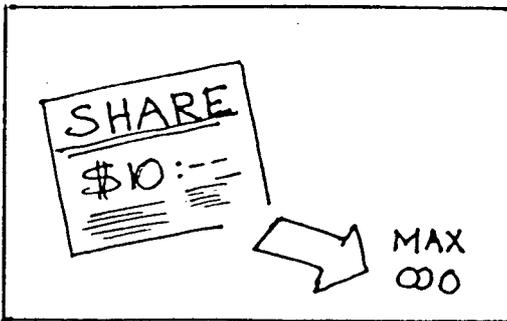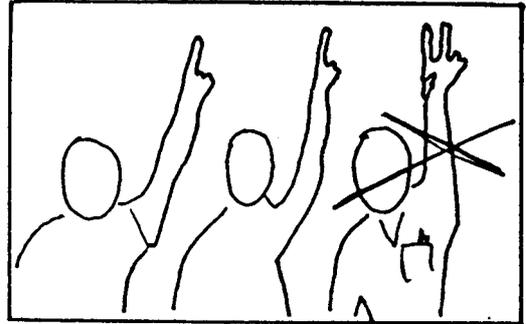
SESSION 3.8

THE OVERHEAD PROJECTOR

Objective: To enable participants to make effective use
                of the overhead projector.

Time: 1 1/2 hour (+ 2 hours for a supplementary exer-
                cise).

Material: A set of transparencies, see 'List of trans-
                parencies'.

Session Guide:

1)   Repeat the fact mentioned (and demonstrated) in sev-
        eral of the previous sessions: properly used visuals
        improve the effectiveness of training sessions. Remind
        participants about the problems encountered at the
        chalkboard, and tell them that the overhead projector
        can help them overcome some of those problems. Show
        Transparency 1 (T.1) with the 'lesson plan' and ex-
        plain the purpose and the contents of this session.

        1   Construction of the ohp

        2   Practical arrangements

        3   Making a transparency

        4   Making use of the ohp

2)   Show T.2 and explain the construction of the projec-
        tor. Then let participants look at a projector. Remove
        the projector stage and point out the various parts.
        Let participants practice changing the lamp.

3)   Point out that projector care is easy: it should be
        protected from dust (show a dust cover), it should not
        be moved when the lamp is hot, and the lenses (includ
        ing the fresnel lens and the glass stage), should not
        be scratched or made dirty. Write the words 'no dust,

no dirt, no moving' on T.2.

4) Show T.1 again and cross out the first line, tell par-
ticipants that we will now continue to explain how we
use an ohp, first from a technical and practical point
of view.

5) Explain that the transparency is placed on the projec-
tor stage so that you, the trainer sitting at the pro-
jector, see it there exactly as the trainees see it on
the screen. Demonstrate how to focus the projected
image on the screen.

6) Stress the most important practical aspect: the projec-
tor should always be ready for use, it should be kept
in a fixed place at the side of the teacher's table,
ready to switch on. A special projector table should
be used so that the stage of the projector is at the
same level as the teacher's table.

7) Show T.3 which illustrates the above, and also shows
that the screen must be tilted, to avoid what is
called "keystoning' - a projected image which is wider
at the top than at the bottom. Point out that the
screen can be made of a sheet of white painted board,
and that there is no need for darkening the room when
using the ohp.

8) Show T.1 again, cross out line 2 - Practical arrange-
ments, and explain that we will continue to talk about
the 'software' - the transparencies.

9) Show samples of blank transparencies (film sheets)
which are available locally, and explain particularly
the differences between cheaper 'write-on film' and
more expensive special film sheets for certain types
of copying machines.

10) Demonstrate which pens are available at the school for
preparation of 'write-on transparencies'. Stress that

a felt-pen giving a non-permanent (soluble) writing should be used so that the image can be wiped of f and the transparency re-used. Also show the permanent type of pens to be used for transparencies which should be kept for repeated use.

11)   Demonstrate if possible, or explain,how transparencies are made in a copying machine. Demonstrate how mater- ial from books and magazines can be used, by first making papercopies, cutting and pasting parts of illustrations,   and then making a transparency from this 'original'.

12)   Show T.1. again, cross out line 3 and explain that we will now discuss the use and value of the ohp in a training context.

13)   Remind participants about one reason why we should use the ohp; we remember better what we see than what we just hear. Show T.4. Ask them to recall the figures mentioned in Session 3.3 Point 12. Fill in 20%, 40% and 70% respectively on the transparency.

14)   Tell participants that a second reason for using the ohp is that it facilitates communication and helps you to 'control the attention' of the class. Show a trans parency with a cartoon or a newspaper clipping of cur- rent interest for a few seconds (T.5). Tell partici- pants that they looked at the screen when you dis- played the picture, and they turned their attention to you the moment you switched off. Show that you can point at details in the visual, on the projector stage, while you still face the class. Compare these possibilities with the work at a chalkboard.

15)   Put a blank transparency on the stage, and write the following lines while you explain that there are three main ways of using the ohp:

¹ - as a chalkboard (as you are doing now);

2 - showing partly prepared transparencies;

3 - showing ready-made transparencies.

16) Demonstrate the second point - using partly prepared transparencies. Explain that you will lead a short discussion on the division of duties and responsibilities in a co-operative society. Use a transparency such as T.6 but without any text. Elicit from participants the structure of the society and the reasons why there is a committee and a manager. Then discuss the duties of the three 'powers' and write in the words as the discussion goes on so that the final picture looks like T.6.

17) Point out that even a minor preparation (such as in this case) is worthwhile and often better than showing a completed picture at once, which may spoil the possibility of involving participants in a discussion.

18) Show T.7 and explain that this is also a partly prepared transparency, showing a business form, but you will now use it as a chalkboard and fill in the form while projecting it on the screen. Point out that the trainees can have their own forms, and that the ohp facilitates the demonstration and communication with trainees. To do the same with the help of a chalkboard would be more difficult and time consuming.

19) To demonstrate transparencies of the ready-made type, begin with T.8 which is a simple list of 'key words' of the type a lecturer uses to remember the outline of his lecture. Put T.8 on the projector and suggest that such a list could be shown to the audience as an introduction to a lecture, and then be referred to later, as the lecture proceeds. At the same time it will function as the lecturer's checklist. Demonstrate that a sheet of paper on top of the transparency will mask the text on the screen, but it can still be seen

through the paper, on the projector stage, by the lec-
turer. This is useful in certain situations, for in-
stance when leading a discussion, which is demonstra-
ted with T.9.

20)   T.9 contains a list of items which a trainer intends
to 'draw out' for the trainees and discuss during a
session. He can read the list through a covering paper
sheet, and unmask the items mentioned by the trainees.
He need not turn his back to the class to write on the
chalkboard. He saves time since the writing is already
done, and he needs no slip of paper to peep at to re-
member the items.

21)   Demonstrate with the help of T.10 how a sheet of paper
can be used to mask certain parts of an illustration.
This example shows the different costs of operation;
they can be unmasked and presented, one by one.

22)   Demonstrate that the step-by-step development of an il-
lustration can also be achieved through the overlay
technique: T.11 consists of two transparencies, the
first one shows the budgeted sales, the second one (to
be placed on top of the first one) shows the actual
sales. (Cover one of the curves with a piece of paper
when making the transparency in a copying machine.)
Several transparencies can be used at the same time.
Show that the transparencies can be mounted together,
using tape as 'hinges' to fit the sheets exactly to-
gether.

23)   Take the opportunity to discuss the use of graphics.
Ask participants to compare the curve chart in T.11
with the bar chart of T.12a, both showing the same
thing. T.12b is another example of a bar chart. Which
type of chart is easiest to understand, most express-
ive?

24) Show T.13 as an example of good use of pie charts to show relative portions of a whole.

25) Demonstrate the use of colours on visuals. Mark one portion of the pie chart (T.13) with a coloured pen.

26) Point out that good visuals are simple and do not present too much information at one time; only the most necessary words should be added to graphics. Show some more examples of graphics, T. 14a, b, etc. and discuss their qualities.

27) Use T.15a, b, c, etc., to demonstrate problems of using transparencies which contain text only. Point out that the same rule applies; the amount of information shown at one time should be limited. Discuss the different examples and agree on some basic rules concerning the minimum size of the letters (4 mm) and maximum number of words and lines for best result (10 lines).

28) Show a transparency which is mounted in a cardboard frame; point out that this may be necessary for certain thin types of film, and show that the frame can also be used to write notes on, a handy 'crib' for a teacher.

29) Show and comment on other available transparencies of special interest to the group (A tip: make transparencies from illustrations in the MATCOM booklets.)

30) To conclude, ask participants to give examples of particular fields of application for the ohp technique in their own subjects. Discuss briefly their ideas. Emphasize that it is not necessary to visualise every point in a lecture, the projector should be used only when it can improve a learning situation, and this is possible if you prepare good visuals (T.16) which help you:

-      simplify and explain complicated matters

-      emphasise and reinforce key points

-      guide you through your talk

-      hold the audience's attention

31)   <u>Supplementary exercise</u>:

Organise a course to practise the preparation of trans-
parencies. This can be done now, immediately after
this session, or at a later time when participants
have planned what visuals they will actually need in
their work.

<u>List of transparencies</u>.

The set of transparencies needed for Session 3.8 can be pre-
pared from the originals included here, if a suitable copy-
ing machine is available.

If possible, adapt the set of material to include samples
of locally produced visuals.

T.1   Lesson plan.

T.2   Projector construction.

T.3   Practical arrangements.

T.4   People retain ...

T.5   Cartoon.

T.6   Distribution of duties.

T.7   A business form.

T.8   Lecture outline (Loan procedures).

T.9   Key points (Financial ratios).

T.10   Chart, operating costs.

T.11   Curve chart, sales.

T.12   Bar charts.

T.13   Pie chart.

T.14   Other samples of graphics.

T.15   Samples containing text only.

T.16   Summary.

LESSON PLAN

1 CONSTRUCTION OF THE OHP

2 PRACTICAL ARRANGEMENTS

3 MAKING TRANSPARENCIES

4 MAKING USE OF THE OHP

OVERHEAD PROJECTOR

Mirror

Focus

Lens

Stage (glass)

Fresnel lens

Fan

Lamp

Reflection
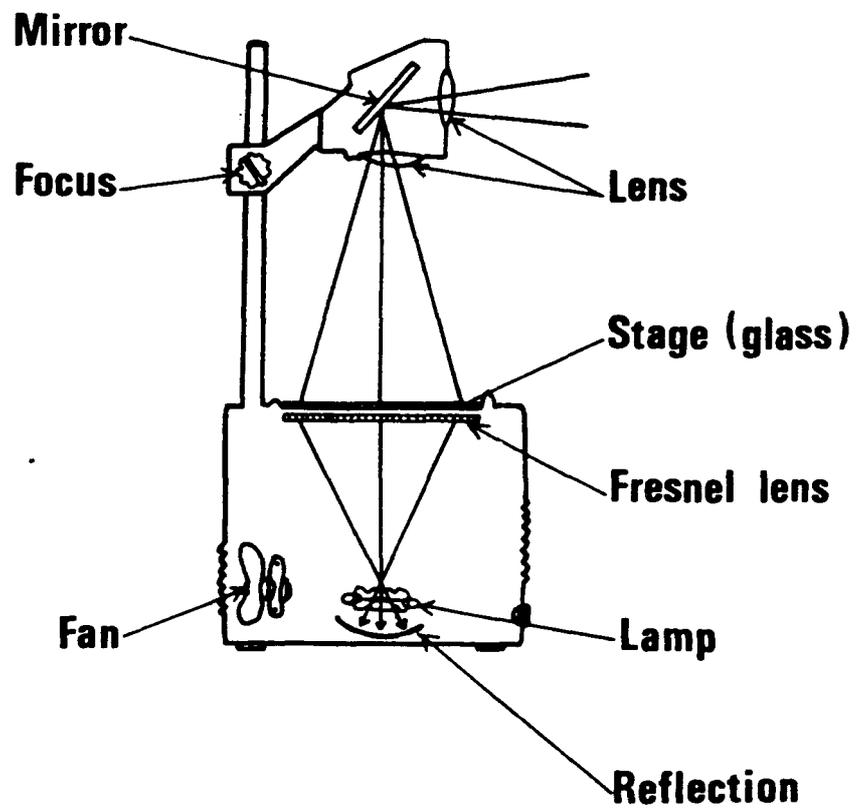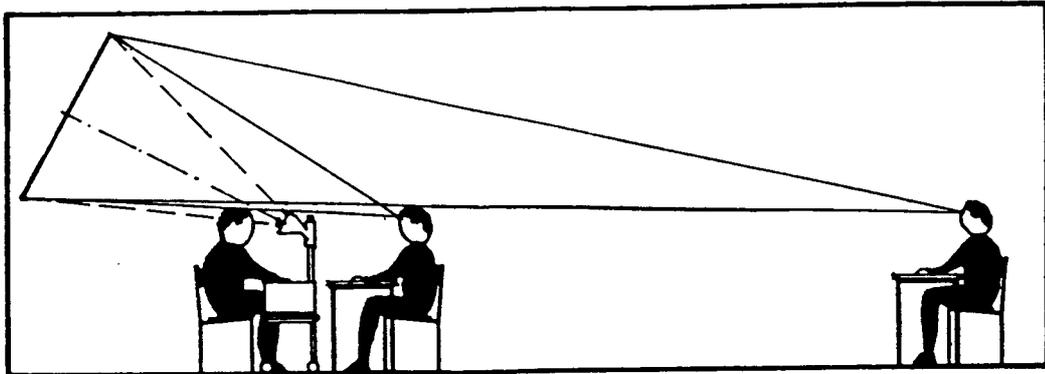
T.3

People retain __%
of what they hear.

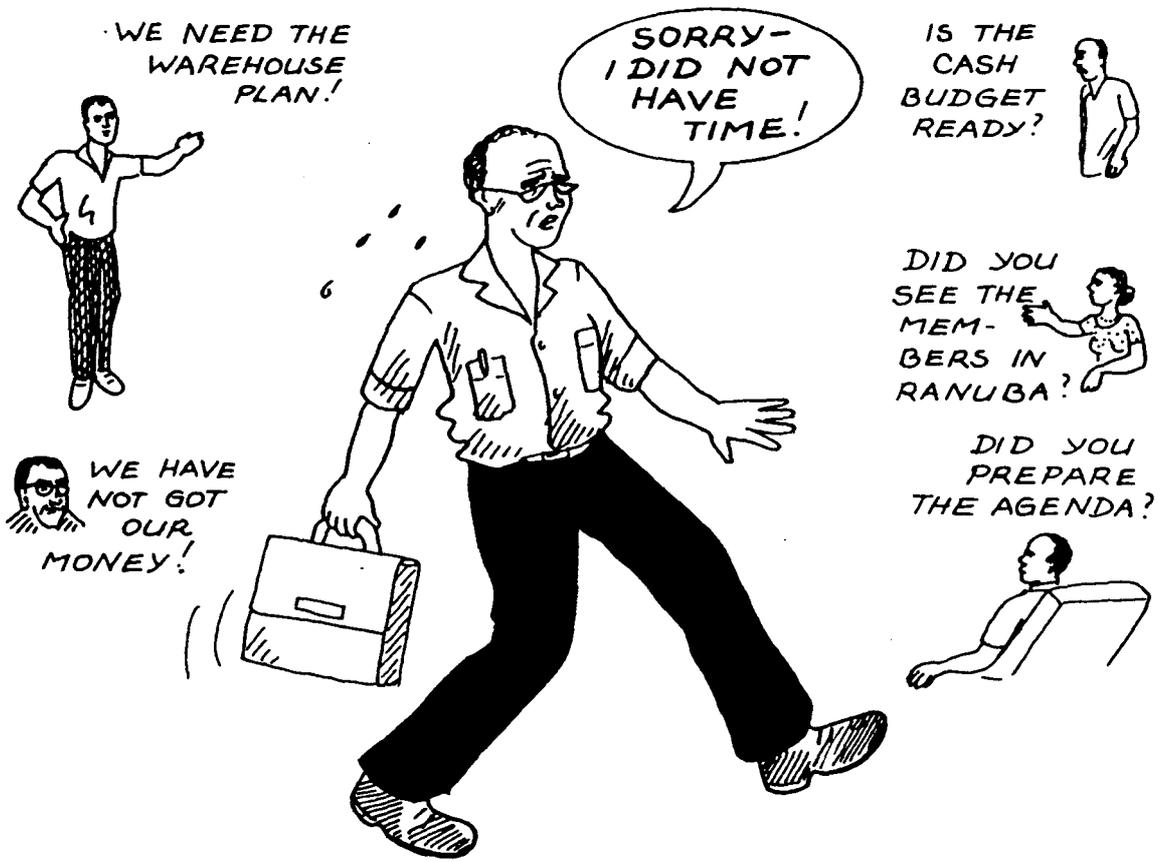People retain __%
of what they see and hear.

But people retain __%
of what they see, hear,
and do.

T.4

MEMBERS
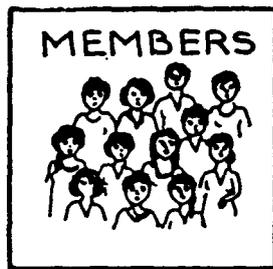
MAKE BY-LAWS
ELECT COMMITTEE
VOTE IN THE AGM
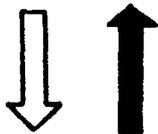
COMMITTEE

MAKE POLICIES
EMPLOY MANAGER
CONTROL OPERATIONS

MANAGER
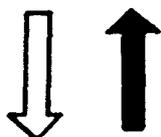
CARRY OUT POLICIES
CONDUCT BUSINESS OPERATIONS
REPORT TO COMMITTEE

T.6

✳ DELTA CO-OPERATIVE ✳

CROP DELIVERY VOUCHER	No. 04909

Member's Name: _____

Membership Number: _____ Date: _____

	Staff Signature	Member Signature
Produce: _____		
Moisture test _____ %		
Grade _____		
Gross weight _____ kg		
Packing weight _____ kg		
Net weight _____ kg		
at $ _____/kg		Payment $ _____ received:
Total price $ _____		
Packing credit $ _____		_____
Net price $ _____		Date: _____

T.7

LOAN APPLICATION
PROCEDURE

- **THE APPLICATION**

- **TREASURER'S COMMENTS**

- **CREDIT COMMITTEE'S ASSESSMENT**
  - **NEED**
  - **APPLICANT'S CHARACTER**
  - **REPAYMENT ABILITY**
  - **PREVIOUS RECORDS**
  - **SECURITY**
  - **FUNDS AVAILABLE**

- **DECISION**
  - **PROMISSORY NOTE**

- **LOAN ISSUING**
  - **RECORDING**

FINANCIAL RATIOS

$$\text{Stock turn ratio} = \frac{\text{The sales}}{\text{(Average stock (at sell. prices)}}$$

$$\begin{array}{l}\text{Average period} \\ \text{(weeks) of accounts} \\ \text{receivable}\end{array} = \frac{\text{Accounts receivable x 52}}{\text{Total sales on account}}$$

$$\text{Debt ratio} = \frac{\text{Foreign capital}}{\text{Total capital}}$$

$$\text{Current ratio} = \frac{\text{Current assets}}{\text{Current liabilities}}$$

$$\text{Quick ratio} = \frac{\text{Current assets - stock}}{\text{Current liabilities}}$$

$$\begin{array}{l}\text{Interest coverage} \\ \text{ratio}\end{array} = \frac{\text{Net profit + interest obligations}}{\text{Interest obligations}}$$

$$\text{Net surplus \%} = \frac{\text{Net surplus x 100}}{\text{Total sales}}$$

$$\begin{array}{l}\text{Return on} \\ \text{members capital}\end{array} = \frac{\text{Net surplus}}{\begin{array}{l}\text{Total of share capital} \\ \text{and reinvested surplus}\end{array}}$$

T.9

STAFF

BUILDING,
EQUIPMENT

TRANSPORT

GROSS
SURPLUS

T$ 10

T$ 182,000

INTEREST

BAGS

OTHER COSTS

T.10

S A L E S

$'000

T.11

$000

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T.12a

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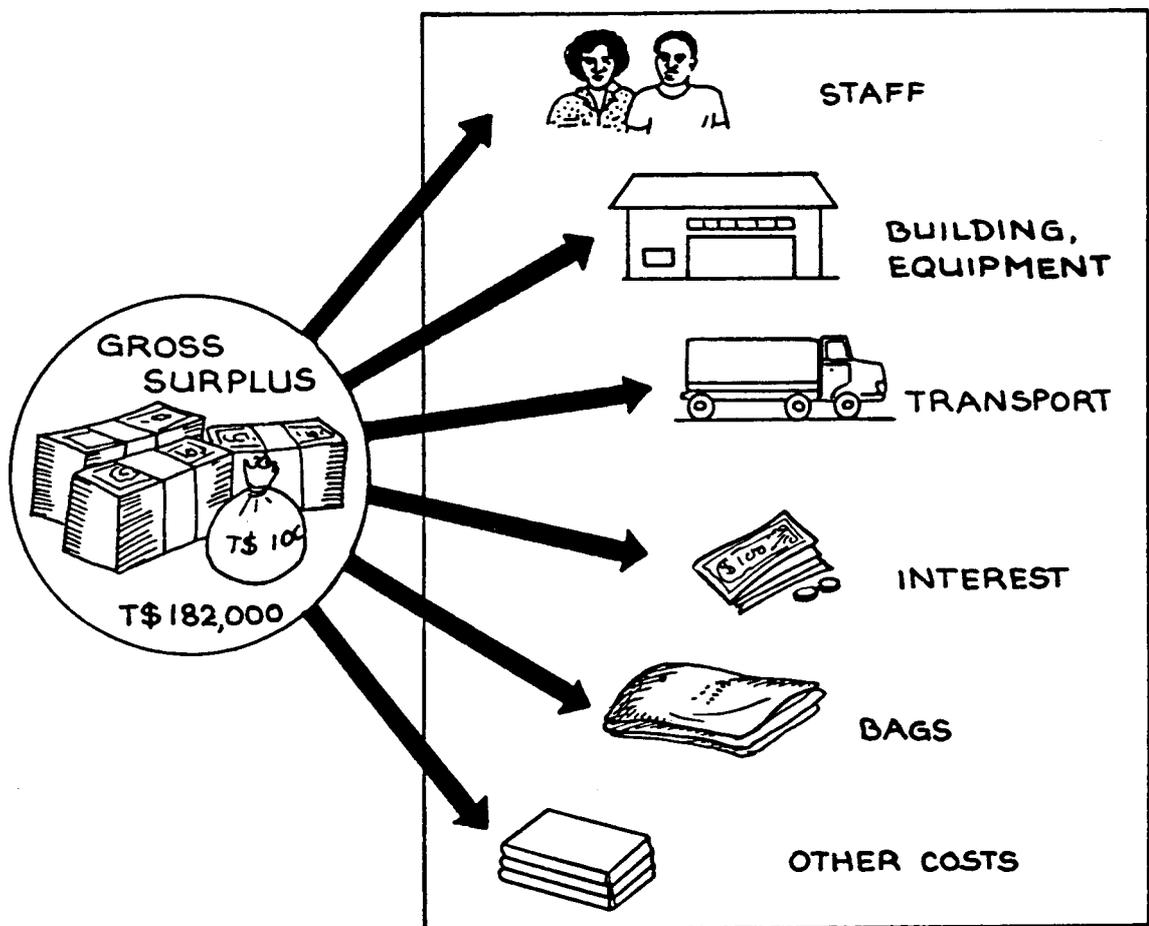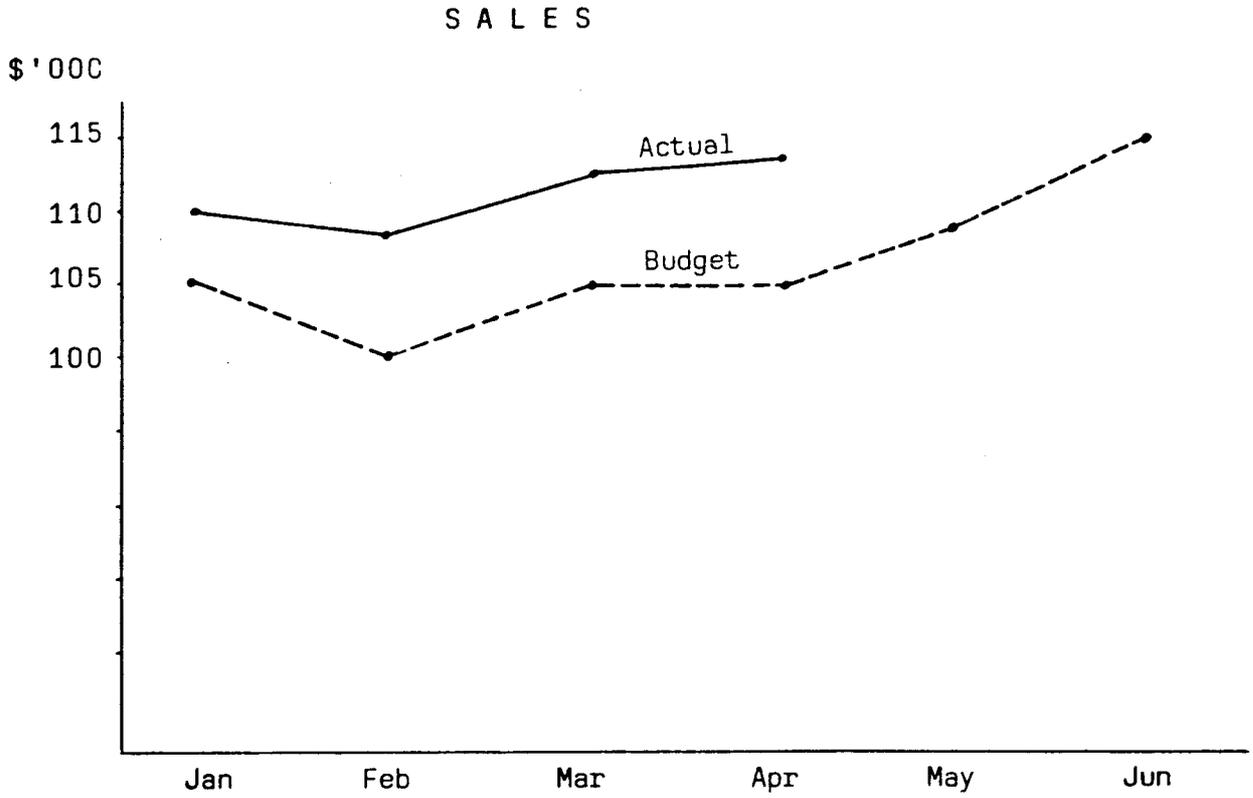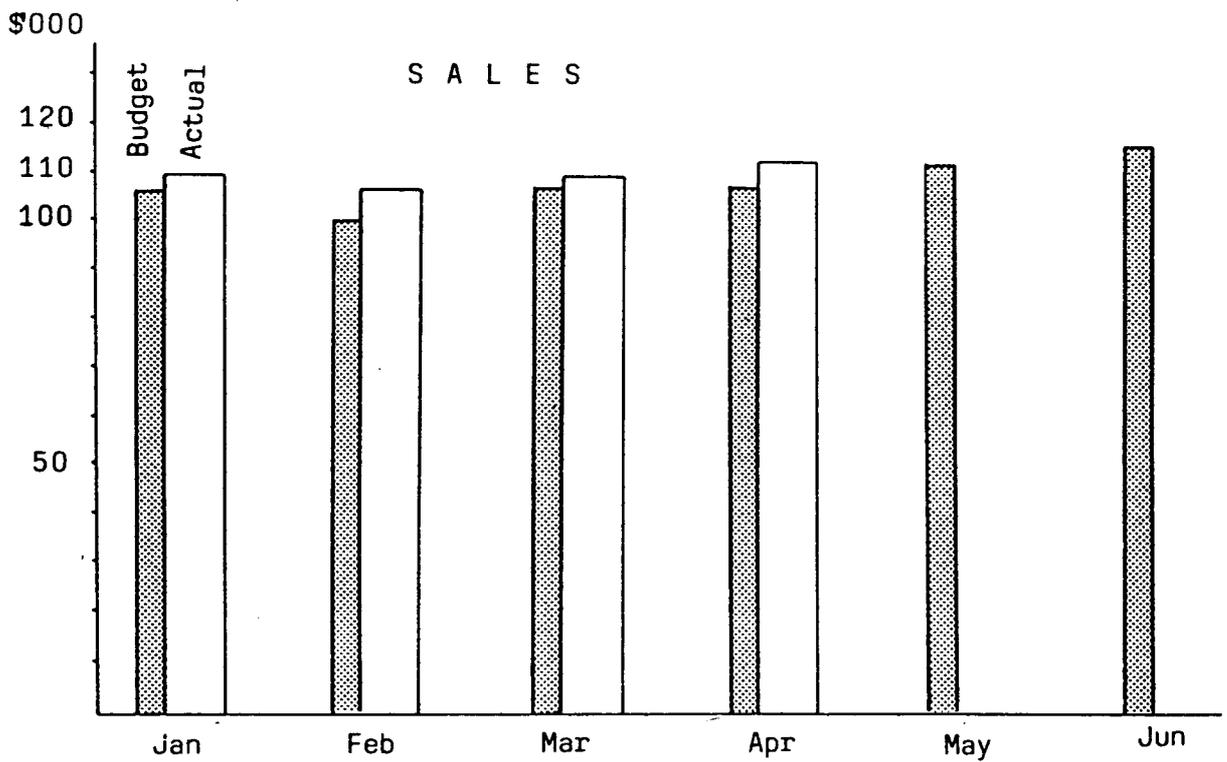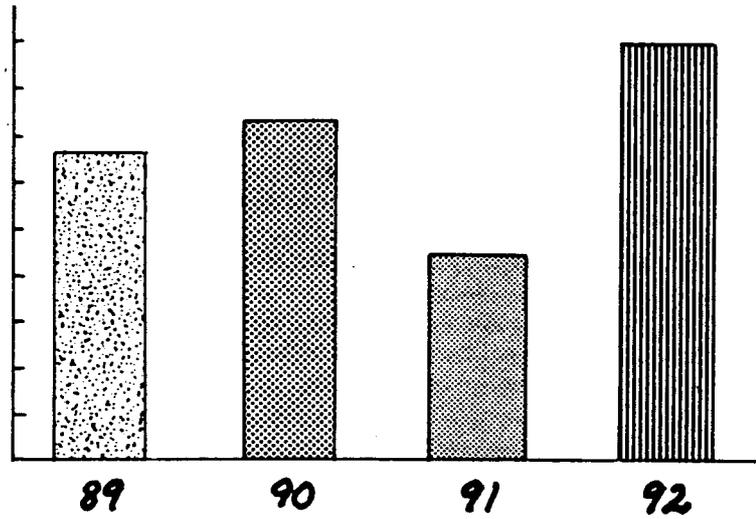
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Res-1

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Extracts from ILO: TTMM
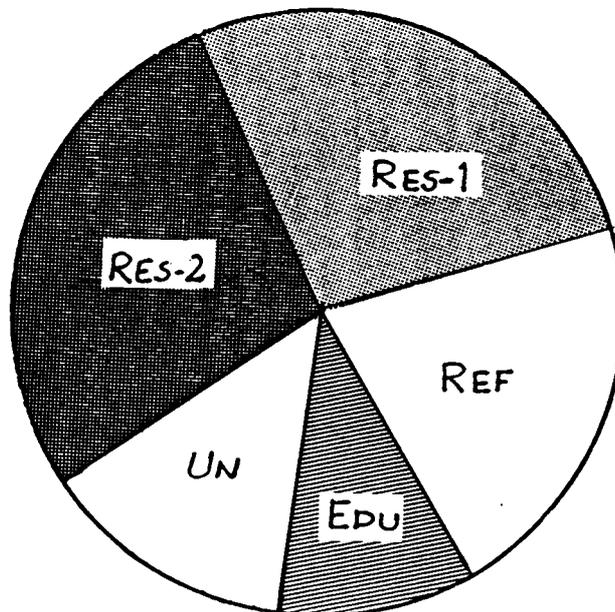
The Traditional Conception of the Training Model

(Needs Assessment) (Objective Setting) (Program Design) (Implementation) (Evaluation)

T.14a

(Needs Assessment Process)
(Evaluation Process) (Objective Setting Process)
(Implementation Process) (Design Process)

Conception of the Training Model as an Integrated Process

T.14b

1. The Development of a Learning System

1. Analysis of Overall System

2. Analysis of Task or Job

3. Specification of
   Required Knowledge,
   Skills and Attitudes

4. Definition of the
   Target Population

5. Statement of Training Need

6. Analysis of Objective in Behavioural Form

7. Course Construction

8. Development of
   Measures of Job
   Proficiency

Definition of Syllabus
Analysis and Synthesis of Content
Determination of Teaching Strategy
Decision on Means of Presentation
Writing of Lesson Sequences

9. Validation

10. Field Testing and Evaluation ⟶ 11. Revision

12. Implementation of System

T.14c

TOTAL
SURPLUS
T$ 4,000

T$ 1,750
USED TO PAY
RUNNING
COSTS

T$ 2,250
LEFT-OVER
MONEY =
NET SURPLUS

T.14d

Analysis of Training Contents:

Nice to Know
Should Know
Must
Know
Priority No. 1
Priority No. 2
Priority No. 3
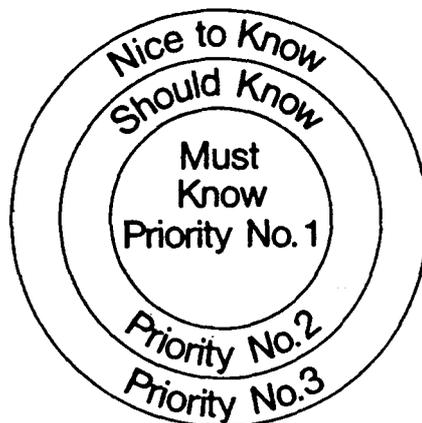
T.14e

TRAINING FOR THE MANAGEMENT OF AGRICULTURAL CO-OPERATIVES

suggested subjects

1. Co-operative Knowledge

2. Co-operative Law

3. "Co-operative" Management

4. Farming

5. Collecting and Receiving Agricultural Produce

6. Transport Management

7. Storage Management

8. Marketing of Agricultural Produce

9. Supply Management

10. Rural Savings and Credit Schemes

11. Staff Management

12. Office Management and Communications

13. Book-keeping and Accounting

14. Financial Management

15. Cost Accounting

16. Risk Management

17. Statistics

18. Project Preparation and Appraisal

19. Work Planning

20. Rural Sociology

21. Economics

22. Development Economics

23. Export Marketing

24. Public Relations, Member Recruitment and Member Education

GAMMA COOP

CROP COLLECTION

TIME: 7·00 a.m. TO 12·00 noon
THURSDAY, FEBRUARY 7th.

PLACE: KILOMETRE STONE 15
ON
PROVINCIAL HIGHWAY 3

PACKING: 50 KILOGRAM SACKS

T.15b

TRANSPORT COSTS	THIS YEAR	ESTIM. NEXT YEAR
FIXED COSTS (LICENSE, INSURANCE)	550	550
VARIABLE COSTS (PETROL, OIL, 25,000 km NEXT YEAR)	5,600	7,400
MAINTENANCE, REPAIRS	1,050	1,050
DEPRECIATION	2,000	2,000
TOTAL TRANSPORT COSTS	9,200	11,000

T.15c

⊛ MATCOM

material and techniques for cooperative management training

The MATCOM Project was launched in 1978 by the International Labour Office, with the financial support of Sweden. Since 1984, MATCOM is financed by Denmark, Finland and Norway.

In collaboration with cooperative organisations and training institutes in all regions of the world, MATCOM designs and produces material for the training of managers of cooperatives and assists in the preparation of adapted versions for use in various countries. MATCOM also provides support for improving the methodology of cooperative training and for the training of trainers.

T.15d

Good Visuals

SIMPLIFY

EXPLAIN

EMPHASISE

REINFORCE

GUIDE

HOLD ATTENTION

SESSION 3.9

LECTURE ASSIGNMENTS

Objective: To enable participants to deliver more effec-
               tive lectures.

Time: 15 min. for the presentation + 15 min. for
               evaluation = I hour for each participant.

Material: Evaluation form - lecturing (see Session 3.2).
               List of possible topics for the lecture assign-
               ments.

Session Guide:

1)   The participants should be given opportunities to prac-
       tice lecturing during the course. It could either be a
       compulsory or a voluntary assignment, depending on the
       aim of the course, and participants' previous exper-
       ience.

       The series of practice lectures can be arranged in
       many ways; a plan should have been made prior to this
       session and participants should now be informed about
       the programme.

2)   Tell participants how they may choose the subject.
       (They may be allowed to select a subject of their own
       choice, or asked to select from the list you provide).

3)   Inform them about the time limit. (You may have a
       fixed time limit, e.g. 15 minutes, for all, or agree
       with each participant on his time limit, depending on
       the subject.) Stress that they will not be permitted
       to run over the time.

4)   Inform participants whether they are free to use the
       aids and visual material they judge suitable for their
       presentations, or if you want them to apply any speci-

fic techniques. (You could, for instance, ask someone
to use the chalkboard, another one the flip chart,
etc.)

5) Tell participants that their presentations will be as-
    sessed by their colleagues, who will fill in the evalu-
    ation sheet.

6) Work out a schedule for the presentations, and inform
    participants about it. (An hour could be reserved each
    day for these assignments, or they could all be done
    at the end of the course.)

The following points should be considered for the presenta-
tions:

1) If necessary, tell the speaker when the time is up,
    and ask him to conclude.

2) Collect the evaluation sheets immediately after the
    presentation and give them to the speaker.

3) Let the speaker himself comment on his performance.

4) Ask participants to comment on the presentation, eli-
    cit the positive points first and urge them to give
    constructive comments.

5) Sum up the discussion and present your own comments.

VIDEO RECORDINGS

If a video camera is available for recording of the lec-
tures, the following points should be considered:

-   Use the video equipment only if it can be done without
    creating a lot of excitement, the equipment should pre-
    ferably be in the classroom permanently and the par
    ticipants should have experience from previous record-
    ings. The cameraperson must be well trained in hand-
    ling the equipment and carry out recordings in a dis-
    creet way without interfering with the training activi-
    ties. The cameraperson should be able to playback the

recording made on a monitor in the classroom without
time consuming preparations.

-    Immediately after a recording, the course leader may
     select only certain parts for playback to the whole
     class in order to discuss important aspects of lectur-
     ing.

-    There is no need for the whole class to see the com-
     plete recordings, the 'lecturer', however, should see
     it as soon as possible after his or her performance,
     when he/she has listened to the comments from collea-
     gues and read the evaluation sheets. The course leader
     should, preferably, be present to draw attention to
     certain details.

Possible subjects for the lecture assignments

-        Our training scheme for co-operative managers. (Ref.
         Session 2.4 Points 4-5.)

-        A critical look at our curriculum for training of com-
         mittee members. (Or any other course.)

-        Some ideas for improvement of our training system.

-        Some views on the group discussion method. (Ref. Ses-
         sion 4.2 Point 23.)

-        How to organise a study visit to a co-operative. (Ref.
         Session 4.8 Point 3.)

-        How to organise 'action commitments' as part of train-
         ing programmes. (Ref. Session 6.1 Point 8.)

-        Organisation and management of a 'training material
         centre' in a co-operative college.

-        How to reduce training costs.

-        The co-operative structure in our country.

-        The difference between co-operatives and other busi-
         ness organisations.

-        How to increase members' interest in their co-opera-
         tive.

-        Public relations work in a co-operative society.

-        School co-operatives.

-        Personnel policy in a co-operative society.

-        Should committee members be paid?

-        Rodent control in a warehouse.

-        How to prevent misuse of a society's vehicles.

-        Patronage refund; principles and practices.

-        Depreciation of fixed assets; principles and practi-
         ces.

topic

4

participatory methods

SESSION 4.1

THE SHORT EXERCISE

Objective: To enable participants to organise simple exercises in order to increase trainees' participation.

Time: 1 - 1 1/2 hour (+ 1/2 hour for supplementary exercise

Material: Handouts:
                'Qualities of a co-operative salesman'.
                'Promotion methods'.
                'Member loyalty'.

Session Guide:

1)   Ask participants to recall the various ways of 'activating' trainees which we have discussed so far:

      -    using questions and discussions,

      -    brainstorming,

      -    bee-hive discussions.

2)   Remind participants about the small exercise in Session 2.1 Point 3, where they were asked to select a number of training topics from a list. Point out that activities of that type are also suitable for increasing trainees' involvement in a training session, thereby improving their chances of learning and retaining what they learn. Therefore we will now demonstrate a few similar exercises.

3)   Ask participants to assume that they are training a group of managers on 'staff management'. They are now supposed to give a lecture about recruitment and training of salespersons and they have decided to first lecture about 'the qualities of a good salesperson'.

SESSION 4.1

<u>THE SHORT EXERCISE</u>

<u>Objective</u>:   To enable participants to organise simple
                exercises in order to increase trainees' par-
                ticipation.

<u>Time</u>:   1 - 1 1/2 hour (+ 1/2 hour for supplementary exer-
                cise

<u>Material</u>:   Handouts:

                'Qualities of a co-operative salesman'.

                'Promotion methods'.

                'Member loyalty'.

<u>Session Guide</u>:

1)   Ask participants to recall the various ways of 'activ-
        ating' trainees which we have discussed so far:

        -    using questions and discussions,

        -    brainstorming,

        -    bee-hive discussions.

2)   Remind participants about the small exercise in
        Session 2.1 Point 3, where they were asked to select a
        number of training topics from a list. Point out that
        activities of that type are also suitable for increas-
        ing trainees' involvement in a training session, there-
        by improving their chances of learning and retaining
        what they learn. Therefore we will now demonstrate a
        few similar exercises.

3)   Ask participants to assume that they are training a
        group of managers on 'staff management'. They are now
        supposed to give a lecture about recruitment and train
        ing of salespersons and they have decided to first
        lecture about 'the qualities of a good salesperson'.

Suggest that a ten-minute lecture would be sufficient, as it is a simple and uncomplicated topic. Ask if the participants agree. Elicit the suggestion that trainees should be involved; it would be more effective to let the trainees themselves identify what qualities a salesman should have. Point out that the result would still be a rather superficial list of qualities. Explain that you will demonstrate an exercise that requires a greater mental effort by the trainees.

4) Distribute the handout 'Qualities of a co-operative salesman' (Sheet 3). Ask participants to read through it and complete the assignment.

5) Interrupt the exercise after about ten minutes and ask participants to report their rankings. The quickest way to organise reporting may be to prepare a table on the chalkboard and fill in the table when participants read out their rankings, or let the participants themselves go to the chalkboard and fill in their rankings as soon as they are ready. An example of a table show the rankings of ten participants:

Rank	Participants' rankings								
1	C	C	C	H	A	C	M	H	A	C
2	H	H	E	C	C	M	C	A	O	A
3	A	A	H	O	E	L	A	C	C	H
4	L	D	A	M	H	A	H	O	H	N
5	E	E	I	L	M	H	L	F	L	B

(To find the item with the highest 'score', give 5 points to those ranked as No 1; 4 points to those in the second line, etc.)

6)   Conduct a discussion on the basis of the rankings done
      by participants. For instance, identify which items
      have been placed on top by most participants and ask
      some to explain their reasons. Then ask a few of those
      who have placed the same item further down to give
      their reasons, etc.

      Keep the discussion as job-oriented as possible and
      challenge participants with practical problems related
      to the recruitment and training of sales staff.

7)   Ask one participant to sum up the conclusions of the
      exercise and the discussion.

8)   When the exercise has been concluded, ask participants
      to assess the learning potential of an exercise like
      this one as compared to a straightforward lecture.
      Point out the value of both the individual efforts to
      do the ranking, and the concluding discussion which
      provides feedback.

9)   Point out that the method of presenting the rankings
      and the follow-up discussions should be adjusted to
      the purpose of the exercise.

      -    If it is important to arrive at a common ranking,
           or to see which item has scored the highest
           points, time must be allowed for calculation.

      -    If the purpose is just to identify and discuss a
           number of important aspects and values it may not
           be necessary to calculate the group's joint rank
           ing, the analysis and discussion are more import-
           ant than the actual ranking.

      -    If it is important that participants are not influ-
           enced by each other in the ranking, the reporting
           methods described above cannot be used. Instead
           the papers should be collected from participants
           and the tabulation done thereafter.

10) Tell participants that the following demonstration of a ranking exercise is taken from one of the courses designed by MATCOM (Supply Management, Session 9.2).

11) Conduct the demonstration as outlined in the Handout 'Promotion methods'(Sheet 4).

12) Interrupt the demonstration when the ranking of the promotion methods has been completed. Explain that the session would normally continue with discussions and conclusions. Refer to the MATCOM manual on 'Supply Management' for those who are interested in the complete session outline.

13) Distribute the handout 'Promotion methods' to participants. Give them a few minutes to read through it, then ask for comments on the exercise. Would the trainees learn more effectively about promotion methods this way or through listening to a lecture?

14) Supplementary exercise:

If time permits, and the need for more practice exists, arrange still another ranking exercise on the basis of the handout 'Member loyalty'. It can be done now, or given to a participant as an assignment for the following day.

Qualities of a co-operative salesman.

Select the five personal characteristics which you consider
most important for a professional co-operative salesman.

Rank them in order of importance, from No.1, (being the
most important) to No.5, (being the least important).

____   A   Strong concern for customers' needs and problems.

____   B   Good knowledge of the products he sells.

____   C   Service minded.

____   D   Hard working.

____   E   Pro-cooperatives.

____   F   Patient.

____   G   Cheerful.

____   H   Honest.

____   I   Higher than average education.

____   J   Higher than average intelligence.

____   K   Persuasive.

____   L   Careful and accurate.

____   M   Higher than average skills in calculations.

____   N   Good co-operative knowledge.

____   O   High hygienic standards.

Extract from ILO-MATCOM:
'Supply management'.
(Example of a ranking exercise)

Promotion methods.

Objective :   To enable trainees to identify the various
                  forms of promotion communications available
                  to them, and to select the most appropriate
                  method to overcome different forms of reluc-
                  tance to purchase goods.

Time :   1 to 2 hours.

Session Guide:

1)   Ask trainees to write down on a sheet of paper as many
      different ways as possible of communicating with mem-
      bers (the ways must, naturally, be those which are
      available to a co-operative society).

2)   Ask trainees to mention one method each. Produce as
      long a list as possible on the chalkboard/ohp. All the
      following methods should be mentioned, and probably
      others, such as radio, which may be available.

      -    Meetings.

      -     Individual contact by society' staff.

      -    Letters.

      -    Advertisements.

      -    Posters.

      -    Displays in the warehouse.

      -    Demonstrations.

      -    Word of mouth via other farmers.

3)   Ask trainees to 'rate' each method as to (a) its im-
     pact, (b) speed, (c) coverage of large numbers, (d)
     costs. Put a table as shown on the overleaf on the
     chalkboard/ohp, and ask trainees to put a "1" for ex-
     cellent (i.e. strong impact, fast, good coverage and
     low cost)"2" for adequate or "3" for poor (i.e. weak
     impact, slow, few farmers covered and expensive), by
     each method, for each characteristic. The figures in
     the table below are one suggestion. They should not be
     shown to trainees and are only given as an indicator
     of what is required.

Method	Impact	Speed	Coverage	Cost
Meetings	2	1	2	2
Posters	3	1	1	1
Contact by staff	1	3	3	3
Letters	2	2	3	2
Advertisements	3	2	2	2
Display in ware-house	3	2	3	1
Demonstrations	1	3	2	2
Word of mouth	1	3	2	1

4)   Refer to the previous session. Play or enact the ans-
     wers by farmers A to J over again. Stop after each
     answer and ask trainees to suggest which method or co~
     bination of methods should

Member loyalty

What is it that makes a farmer loyal to his co-operative so-
ciety?   Select the five most crucial aspects in your opin-
ion. Rank them in order of importance, from No.1 (being the
most important) to No.5 (being the least important).

_____ A   His personal relations to the manager.

_____ B   The proximity to the society warehouse.

_____ C   The personal attitudes of the staff, their
                 politeness and good behaviour.

_____ D   The feeling of being a member - an owner.

_____ E   The fair price paid by the society.

_____ F   The quick payment for his produce.

_____ G   His belief that it will pay economically (in the
                 long term) to be a member.

_____ H   His fear of loosing the services of the society
                 if he does not support it.

_____ I   The   reliable   information   provided   by   the
                 society.

_____ J   The informal and familiar trading procedures in
                 the co-operative.

_____ K   The return on the share capital.

_____ L   The efficient procedures used for collecting,
                 grading and weighing of produce.

SESSION 4.2

THE GROUP DISCUSSION

Objective: To enable participants to organise effective
group discussions.

Time: 1 1/2 - 2 hours.

Material: Handout 'The best manager'.

Session Guide:

1)   Remind participants that some of the 'exercises' demon-
strated earlier were carried out individually, or join-
tly by the whole group in a discussion. Point out that
they could have been done in small groups instead, and
that there are certain advantages with the group dis-
cussion method, which we will now study. As an intro-
duction a short group discussion will be carried out.

2)   Distribute the handout "The Best Manager" and ask par-
ticipants to read through it.

3)   Ask participants to assume that you have just con-
cluded a training session on 'leakage' in retailing;
you have dealt thoroughly with the problem, and your
trainees know that leakage is something bad which
should be reduced as much as possible. They know that
leakage can vary from shop to shop, depending on the
skills and ambitions of the shop manager. Now you want
to conclude the session with a group discussion, to
ensure that all your trainees will have the correct
attitude to the problem of leakage.

4)   Divide the class into groups of four to six members.
Use the 'counting method' to form groups. (For in-
stance, if they are 20, let them count out loud and in
order as they are seated, 1-2-3-4, 1-2-3-4, etc. to,

form four groups of five members each. Let all number
"ones" form one group, etc.)

5)   Tell participants that they need not elect chairmen in
     the groups, and that any group member may be asked to
     sum up and report the group's conclusion afterwards.
     Instruct the groups to go to their group-rooms and dis-
     cuss for a maximum of 15 minutes.

6)   In the meantime, prepare one of the participants, who
     should not take part in the discussions, to lead the
     'reporting' session. Write the table with the three
     managers' results on the chalkboard, and let him read
     through the 'notes for the teacher' provided. Tell him
     to plan the reporting in the following way:

     a)   first appoint a spokesman from each group and ask
          him to come up in front of the class;

     b)   ask the spokesmen to state which manager his group
          considers to be the best one;

     c)   then ask the spokesmen to present their groups' ar-
          guments;

     d)   lead a general, short discussion to elicit more
          comments from the other group members; and

     e)   make a summary along the lines provided in the
          'notes for the teacher'.

7)   Having briefed the participant reconvene the groups
     and let the selected participant conduct the 'report-
     ing' as outlined in Point 6 above.

8)   When the discussion has been concluded, tell partici-
     pants that we will now leave the subject of leakage
     and instead take a look at the training method used:
     the group discussion. Present a list on the flip chart
     comprising all the questions listed below (9-22). Then
     deal with the questions with reference to the group
     discussion just completed and participants' own experi-

ence. Bring up all aspects included in the following
comments, and ask participants to take notes during
the discussion.

Questions:

9) How is typical group work organised?

    Refer to the demonstration session: 1) A case is pre-
    sented to the class. 2) The class is divided into
    smaller groups. 3) The groups discuss the case and, if
    it involves a problem, agree on a solution. 4) The
    groups are reconvened to a general session, and each
    group presents its conclusions. 5) A general dis-
    cussion and a summary concludes the exercise.

10) Why use group discussions?

    Refer to the demonstration session. Point out that the
    conclusions reached in the discussions on 'leakage'
    could also have been presented in a lecture through a
    short statement from the lecturer, e.g.: 'Leakage is
    only one of several aspects to consider when evaluat-
    ing the performance of a shop manager. Leakage control
    is very important but service and surplus are equally
    important.'

    Ask participants to compare the two methods with re-
    gard to time used and the effects achieved. Was it
    worth the extra time to have a group discussion, -
    what was gained? Discuss and elicit the advantages of
    group discussions:

    -   Trainees are participating. They themselves ana-
        lyse the problem, not the teacher, and they have
        to form an opinion.

    -   In a discussion trainees receive feedback continu-
        ously.

    -   Learning is reinforced (because those two learning
        principles are applied).

- Trainees will learn to assess the opinion of others. They will practice team work and decision-making; the method itself is an example of practical 'co-operation', like in real co-operative management. (Some trainers therefore believe that the actual 'process' is equally important as the 'result', in a group discussion.)

- The exercises and case studies which the groups discuss can be constructed in such a way that they reflect of real management situations. If the training method itself is also similar to a management situation, we have created a learning situation which is very much job-oriented, and therefore ought to be effective.

- Attitudes can be changed through group influence.

11) <u>When to use group discussions</u>?

   Elicit the following in a discussion:

   - for problems which have several possible solutions;

   - when a problem must be analysed to prepare a well thought-out answer;

   - when a deeper understanding of certain issues is desired.

   Point out that such issues/problems are common in the fields of management, e.g. matters related to personnel management, financial management, etc.

12) <u>When not to use group discussions</u>?

   Point out that group work should not be applied if trainees are not trained and used to working in groups. Also stress that the cost/benefit aspect must be considered. Cost here means time. If the problem is trivial and the solution straightforward there is nothing to gain from arranging a group discussion.

13) <u>How to form the groups</u>?

Refer to the method used in the demonstration session
(Point 4 above) as an example of 'random' formation.
This usually results in heterogeneous groups – the
group members having varying qualifications. The
trainer may also make the division into groups based
on a certain principle, e.g. letting trainees with
similar backgrounds work together. Usually, heterogen-
eous groups are preferred. It is implied in this train-
ing method that people of different types should share
experiences and learn to work together. Apart from
that, such groups usually need about the same time to
finish the assignment, which is a valuable practical
aspect.

14) <u>The size of the groups</u>?

A common recommendation is a minimum of three and a
maximum of seven members. In smaller groups there is a
risk of one person dominating the discussion.

15) <u>When to change the groups</u>?

Keep the same groups until the assignment (one separ-
ate subject-matter unit) has been completed. This may
take in one or more meetings of the groups.

16) <u>Which instructions should be given to the groups</u>?

Trainees should have very clear instructions as to:

-    the purpose of their work, (for instance to dis-
     cuss an issue and present an analysis afterwards,
     like in the discussion on leakage, or to discuss a
     problem and agree on a solution);

-    which group they belong to;

-    which room their group can use, (if the classroom
     is large enough it may be more practical to let

the groups stay there than to send them to separ-
ate group rooms);

-   the time available (see Point 17 immediately be-
    low).

-   how the group should report its *findings* (see
    Point 20.

17)   <u>How much time is needed</u>?

Obviously, this depends on the type of assignment. In
our demonstration only 15 minutes was needed for dis-
cussions but group assignments can also take a whole
day or more. Generally, it is better to allow more
time for the reporting session than for the groups'
work.

18)   <u>What about group leaders</u>?

A group will function even without a chairman, a
leader. Someone will take the initiative and start dis-
cussions. This could take some time if the members are
not used to the situation.

All group members should be warned that anyone of them
may be asked to do the reporting. That means that no
special 'secretary' need be appointed.

19)   <u>What should the teacher do during group discussions</u>?

The trainer who thinks that he now has an opportunity
to relax is definitely wrong. He must be available for
groups which need his assistance, and let them know
where they can find him. Some trainers spend a few min-
utes with each group, while others prefer to take
part, (as an ordinary group member), in one of the
groups.

20)   <u>How to organise the reporting</u>?

Stress that it is important that the presentation of

the groups' findings does not turn into some kind of a
'show' and competition involving only a few selected
trainees instead of being a continued 'learning activ-
ity' involving everybody. Refer to the earlier demon-
stration session. Explain the efforts made to achieve
this:

-   The 'reporters' were not appointed until the dis-
    cussions had been concluded.

-   All trainees were urged to raise questions about
    the views presented, to argue and defend their own
    views.

Point out that there are many methods for reporting -
be it verbal or written. Using flip charts and ohp,
even small exhibitions or role play performances are
possible.

If the groups have more or less the same things to say
it is sufficient to let the first group make a com-
plete report, and the other groups may just bring up
complementary details.

21) How to train the trainees for group work?

     Tell participants that the following approach may be
     useful:

-    The first tries at group work should be short (15
     minutes), and the topics should be clearly defi-
     ned.

-    The instructions should be detailed and in writ-
     ing.

-    All material needed should be provided.

-    Group leaders should be appointed and maybe given
     special briefing.

     Gradually, the instructions can be less detailed and
     the periods longer as the groups will learn to take on

the responsibility for both the work process and the result.

22) <u>Any particular problems</u>?

Discuss how the 'dynamics' of a group cause people to behave in different ways, and how these forces will affect the work in a group. Remind participants about the group discussions in Sessions 2.6 and 3.2 on how to identify training needs. On those occasions they had a chairman, not so this time. Discuss the situation:

- Did you wait a long for someone to take the initiative, what happened actually?

- Did everyone participate in the discussion?

- Did you feel comfortable without a chairman?

- Did you agree on a joint statement?

Point out that group dynamics may occasionally result in conflicts, power struggles and a poor working climate, but trainees should learn to avoid such development. and realise that a positive atmosphere (and everybody's contribution) are necessary to achieve a common goal. Usually, work distribution will not be a problem when group members accept this fact.

Point out that a trainer may need to discuss these matters with the entire class if he notices that the groups have problems or that some trainees show a lack of motivation for work in smaller groups.

23) Remind participants that a summary and critical review of the group discussion method will be made by one of them as a lecture assignment (Session 3.9).

The Best Manager.

Three managers were offered the same shop to manage for one year each. We assume that the conditions were the same for all three of them. Here are their results:

	Manager A	Manager B	Manager C
Sales	200,000	400,000	400,000
Leakage	0.5% 1,000	1.0% 4,000	1.2% 4,800
Net surplus	4.0% 8,000	3.0% 12,000	3.5% 14,000

A has a lower leakage and a higher percentage surplus than B, but he neglected the sales. Is he the better manager of the two? Which is most important? Discuss.

B and C are equally good salesmen. B. has the lower leakage. Is she the best manager? Discuss.

MANAGER A

LEAST
LEAKAGE

MANAGER B

HIGH
SALES

MANAGER C

HIGHEST
SURPLUS

The Best Manager

Notes for the teacher:

This case illustrates the leakage problem from a general point of view. Let trainees discuss it, first in smaller groups, then let them report their views during a general meeting. Ensure that the following points are mentioned:

- The figures for Manager A indicate that he is a very careful person. He manages to keep the leakage at an acceptable level and he is also careful not to spend too much money. Therefore, he has got the highest surplus in relation to sales.

- B is a good businesswoman. She wants to give good service to her customers and she manages to meet their demands. Thus, she has doubled sales compared to Manager A. But, the net surplus did not double, because the leakage and the costs also increased. Still B is better than A, because the members were able to buy more in their own shop and they got a higher surplus.

- Manager C is as good a salesman as B. His leakage is high, nonetheless he has managed to get a higher net surplus. That must be due to his ability to keep other costs down. Therefore, he must be considered as the best manager of the three in spite of the high leakage.

This shows that low leakage as such is not enough to make a good manager. The service given to the members and the surplus are more important. The very best manager would be a combination of A and C. If C had also managed to keep the leakage at 0.5%, his net surplus would have been 16,800.

SESSION 4.3

THE MICRO-CASE

Objective: To enable participants to make effective use
                  of 'micro-cases' in management training.

Time: 1 hour.

Material: Micro cases 'The manager and his committee'.
                  Handout 'Questions for case study analysis'.

Session Guide:

1)   Distribute the handout with the micro cases. Give par-
      ticipants a few minutes to read the stories.

2)   Remind participants about the discussion about 'leak-
      age' in the previous session. Point out that it was
      based on a fictitious story about some managers. Ex
      plain that these stories are different, they describe
      realistic situations in co-operative societies and can
      be called 'case studies'. As the examples are very
      short and describe only particular 'incidents' they
      can be called 'micro cases'.

3)   Remind participants about the purpose of a case study;
      to expose trainees to a management situation in order
      to let them practice analysis and decision-making.
      Point out that case studies may be true or fictional
      but they must reflect a realistic situation, like
      these examples do. Explain that these cases were writ-
      ten by a trainer as a basis for a training session on
      'manager/committee relations'.

4)   Suggest that all together, in a discussion, analyse
      case 1. Give participants five minutes to read and
      think about this case again.

5) Lead a discussion along the lines suggested in the paper 'Questions for case study analysis'. Ensure, that the following points are made by the participants (the figures refer to the questions):

(3) The position of the manager has been undermined. His authority may be questioned in the future, the staff rules may be ignored.

(4) Lack of communication and coordination between committee and manager has caused the problem. If the committee had been informed about the incident, the problem would not have occurred.

(5) The actual incident is a symptom of poor coordination.

(6) The main issue: the manager and the committee are not working together for a common goal.

(10) A possible course of action: A meeting with all staff members and the committee to clarify the issue; an agreement with the committee on demarcation of powers.

6) When the discussion has been concluded, explain that a training session based on a case study is usually organised as a group discussion, as demonstrated in the previous session. Describe the common approach:

- Trainees read the case.

- Trainees discuss and analyse the case in groups. They identify any problems, and suggest a solution.

- The groups present their conclusions in a general session for comments and further discussion.

7) Stress the key role of the trainer. He must be able to resist giving any 'answers' but just guide the trainees through proper questioning, when necessary

8) Suggest that case 2 be dealt with as group work. Keep the same groups and group-rooms as in the previous session, and allow 10 minutes for group discussion.

9) In the meantime, prepare one of the participants to lead the reporting and general discussion afterwards. Give him the paper 'Questions for case study analysis' and point out to him the important points which he should try to elicit in the discussion:

(3) The manager seems to be prevented from giving the members the best possible service.

(4) The problem was caused by rules being too rigid.

(5) The reprimand was symptomatic of a lack of confidence in the manager.

(6) Again, the main issue is that the manager and the committee are not working together.

(10) The manager should try to persuade the committee to lay down only broad policies and leave their implementation to himself.

10) Reconvene the groups and let the selected participant lead the groups' reporting and the concluding discussion.

11) After the discussion, ask participants to fill in an evaluation sheet for discussion leading. Comment on the performance of the discussion-leader. Note whether he fell into the trap of starting to 'lecture', or if he managed to elicit all important points from the participants.

12) Remind participants that the cases we now dealt with were short stories (micro cases) describing only single incidents. Explain that the first cases used in management training were of the opposite type; very detailed descriptions of an enterprise, comprising all

kinds of data and background information, and it took
the students hours, or days, just to analyse the cases
and identify the problems before they could start
thinking of any solutions. Explain that the most com-
mon type of case studies used in MATCOM courses, for
instance, consist of a few pages of information, and
can be studied in a few hours.

Also mention that some types of case studies do not
specify the problem or instruct the students what to
look for. It is left to them to find out. MATCOM's
case studies usually specify the assignment.

Tell participants that a demonstration of a typical
MATCOM case will be given in the next session, which
will be conducted by one of the participants.

13) Distribute the paper 'Questions for case study analy-
sis' to all participants.

Extract from ILO-MATCOM:

'Management of Larger Agricultural Co-operatives'.

<u>The manager and his committee - Micro cases</u>

For each of the following situations, decide who was right
and how the disagreement might have been avoided.

1)   The manager of the co-operative society had warned all
       the warehouse staff about the danger of smoking in the
       warehouse, and had said that if *anyone* was caught he
       would be dismissed. Sometime later he discovered a
       warehouse labourer smoking in a corner in the ware-
       house. This man had worked loyally for the society for
       many years but the manager felt that no exception
       could be made and (after necessary inquiry and follow-
       ing the legal procedure) dismissed the man. The la-
       bourer appealed to the committee, who overruled the
       manager and reinstated the labourer. The manager
       complained that by doing so they had gravely under-
       mined his position.

2)   The committee of a co-operative society decided that
       in the interest of co-operative solidarity they should
       only buy seed from a co-operative supplier. Some
       months later there was a sudden unexpected demand for
       a particular type of seed. The approved co-operative
       supplier could only offer a limited quantity and the
       manager decided to purchase from a private source in
       order to satisfy members' needs. He was severely re-
       primanded by the committee, but explained that he was
       only trying to satisfy the members.

Extract from ILO: TTMM

Questions for case study analysis.

1   What is going on here?

2   Is there a problem at all?

3   What precisely is the problem?

4   What has caused it?

5   Are we looking at causes or symptoms?

6   What are the main issues?

7   Why are these issues important?

8   Whose problems is it?

9   What precisely are his objectives?

10   What possible courses of action are open?

11   How realistic is each of the actions proposed?

12   What are their possible effect(s)?

13   What should he do?

SESSION 4.4

THE CASE STUDY

Objective: To enable participants to conduct training
                sessions based on case studies.

Time: 1 1/2 - 2 hours (+ 4 to 5 hours for the supplemen-
                tary exercise).

Material: Case study 'The basket weavers'.
                Evaluation Sheet - Discussion leading (Session
                3.2).
                For the supplementary exercise: material inclu-
                ded in Session 2.4. (Points 11-18).

This session may be conducted by one of the participants
who should be given the case and the session guide and be
briefed by the course leader one or two days in advance.

Session Guide:

1)   Explain to participants that the purpose of this
        session is to demonstrate the use of a typical case
        study.

2)   Ask participants to assume that they are managers of
        co-operative unions, taking part in a refresher course
        on co-operative management. At the moment they are stu
        dying problems of 'promoting co-operatives', including
        such topics as selling the idea of co-operation, start-
        ing new societies and reviving old ones.

3)   Remind trainees that their unions exist as a result of
        activities in the primary societies. Therefore, the
        primary societies are often concerned with problems of
        their union, but it also happens that a union manager
        must take action to solve problems on the primary
        level. The case you will now be given to study des-

cribes such a problem, and you will discuss what should be done to solve it.

4) Divide the class into groups of 4 - 6 members. Distribute the case study and tell the trainees that you want the groups to present their suggestions after 40 minutes.

5) Reconvene the groups and appoint a spokesman for each group.

Ask the spokesmen to state briefly what they believe the problem is in the weavers' situation, why it occured and what alternative solutions there were.

It is important to distinguish between reasons for the problem, (such as lack of co-operation, exploitation by the traders or the shortage of reeds) and the problem itself - which is the poverty of the rural people and in particular the difficulties of the women weavers.

The possible alternatives might include:

-   The establishment of a Government handicraft corporation to buy and market the baskets.

-   Encouragement of outside traders to enter the area and compete with the monopolistic group at present in control.

-   Encouragement and financing of one or more of the basket weavers to establish a business to supply raw materials and marketing the baskets.

-   Promoting a co-operative society to perform these functions.

-   Promoting a co-operative society to perform the material supply function but to leave marketing in the hands of the traders - at least for the time being.

6)   Ask groups to suggest which solution they prefer and how it should be implemented.

Trainees must realise that the traders are performing the two valuable functions of supplying raw materials and marketing the products. Any alternative must also perform these functions, and it is more likely to do this effectively if it is competing with the existing traders rather than supplanting them because they have been driven from the region or are legally prevented from continuing.

The encouragement of alternative private sector organisations may be a preferable solution but, if a co-operative is to be established, the following guidelines should be followed:

-   The initiative for co-operative action must come from the weavers themselves, albeit with tactful suggestions from outside.

-   It is necessary to identify opinion leaders who may not be among the weavers themselves, but who have the necessary status to propose (and assist) in the implementation of a co-operative enterprise.

-   It may be possible to work with one or more of the traders rather than to incur their enmity and run the risk that they will frustrate the newly established co-operative.

-   The weapon of money should be used very sparingly - if at all. The weavers must be encouraged to mobilise their own resources, however meagre they are, in order to finance the collection of materials and to market their products. It may be possible to persuade some buyers to pay in advance for baskets in order to finance raw material collection.

-   It is necessary to plan a member recruitment pro-

gramme which convinces prospective members of the
        personal advantages of joining the co-operative.

7)   Make a summary of the discussion. Point out the risk
     that union managers might immediately jump to the con-
     clusion that a weavers' co-operative is the only solu
     tion, but the discussion has shown that a proper analy-
     sis is necessary.

8)   The course leader should now take over the session to
     conduct a discussion on the training method used: the
     case study.

9)   First, point out that the role of the trainer is very
     different when working with a case study, as compared
     to lecturing. Distribute the sheet 'Evaluation – Dis
     cussion Leading' Session 3.2 Sheet 4), and ask all par-
     ticipants to fill it in. Collect the sheets and hand
     them over to the discussion leader.

10) Point out that the objective of the case study was:

     -    to enable trainees to recognise conditions which
          are (and are not) conducive to the establishment
          of a co-operative, to suggest alternative solu
          tions for problems of rural poverty and to design
          a strategy for promoting a co-operative if this is
          an appropriate solution.

     Ask participants if they think that the objective
     could have been better achieved through any other me-
     thod, for instance a lecture. Identify the advantages
     of group discussions in this particular learning situa-
     tion.

11) Ask participants to mention any problems they can
     think about in connection with the case study method.
     Elicit at least the following:

a)   It is difficult to prepare effective case studies.
     Point out that many cases are available, for in-
     stance in the MATCOM material, and that many train
     ing centres are building up 'banks' of case stud-
     ies. Also refer to the material on case study writ-
     ing prepared by the International Cooperative Al-
     liance, if available.

b)   It takes a long time to analyse and discuss a
     case. Point out that if the case is complicated it
     can be given to the trainees the day before to
     study as a home work. To identify the problem and
     its causes is a very important part of the assign-
     ment, it usually takes longer time than finding
     the solution, just as in real life.

c)   The trainees may be better than the teacher in ana-
     lysing the case. This is natural if trainees are
     experienced managers, and the case method is, in
     fact, the best in such situations, as their exper-
     iences will be drawn upon. The trainer should just
     remember his role as organiser of the learning
     situation. In a case study situation he is not at
     all a lecturer.

d)   It is frustrating that there is no 'right answer'.
     This is a reflection of reality. Managers will
     soon learn that in many cases there is no single
     best solution to a problem.

e)   The teacher can not be prepared for all possible
     suggestions. True, but the better he is prepared,
     the better the session will be. He should try to
     think about all possible arguments and solutions,
     not only the one he thinks are the best. If the
     case involves calculations he should try out vari-
     ous solutions to see where they lead.

12) Supplementary exercise:

The case study included as a supplementary exercise in

Session 2.4, Points 11 - 18, could now be carried out, if time permits. Two or three of the participants should be given the task of planning and conducting the session.

would sell her baskets back to the same person, who would deduct the costs of the reeds before paying for them.

Problems soon arose because dishonest women took their baskets to other traders. A number of less efficient traders went out of business, and by the time the Union was established there were only five traders supplying reeds and buying the completed baskets in the whole of Gamma District. The traders were related to each other by blood or marriage, and they maintained a similar price level and ensured that the women sold their work to the same trader who had advanced them the materials. Apart from purely local sales, all the baskets were sold through these five traders. The price difference between the cost of the reeds and the value of the completed basket was substantially reduced in real terms over the years, but the traders claimed that this was inevitable because of competition from plastic and other modern materials. It was very difficult for women to travel outside the district to check on prices, and those who attempted to do this found that the traders were not as willing to do business with them in the future.

The traders sold their baskets to markets throughout the country, and to the few export buyers who managed to get to Gamma District. These buyers sometimes asked for design changes or other improvements such as advance dipping of all reeds to kill insects, but the traders said that they had enough problems with the women without asking for more.

Some of the women complained to their local MP that they were being exploited by the traders. Since the Co-operative Union was apparently having favourable impact on the farming sector of Alpha Region, the Registrar of Co-operative Societies asked the General Manager of the Union to suggest how the women's problem might be solved, and what role the Union might play?

Assignment:

Imagine yourself to be the General Manager of the Alpha Co-operative Union. What would you recommend?

When you discuss the problem, follow this procedure:

1.   What is the problem?

2.   What has caused the problem?

3.   What possible alternatives are there for solving the problem?

4.   Which alternative is the best?

5.   How should it be implemented?

Session 2.4, Points 11 - 18, could now be carried out, if time permits. Two or three of the participants should be given the task of planning and conducting the session.

SESSION 4.5

THE ROLE PLAY

Objective: To enable participants to make adequate use of
               role plays in co-operative management training
               activities.

Time: 1 1/2 - 2 hours (+ 1 hour for supplementary exer-
               cise).

Material: Role play briefs.

Session Guide:

1)   Remind participants about the difference between a
      case study and a role play. In a case study we discuss
      a problem and we tell what we are going to do about
      it. In a role play we pretend to be in the real situ-
      ation and show what we actually do.

2)   Point out that there are many tasks in a co-operative
      society for which role plays are the most natural and
      effective form of training, for instance the sales
      work of shop assistants. In a lecture they can only be
      told how to deal with the customers, in a role play
      they can practice selected parts of their work, and
      they will receive immediate feedback from the instruc-
      tor, fellow trainees and, maybe, through a video re-
      cording. Tell participants that you will show a quick
      example.

3)   Select one participant to come in front of the class
      and play the role of a shop assistant. Tell the par-
      ticipant to use the table as his counter, and some
      available items within reach to be used as commodities
      for sale. A 'cash box' on the table with some notes
      and coins are also needed.

Ask the salesman to do the best to serve the customer who now will come into the shop. Explain that yourself will play the role of a customer, and ask the participants to carefully observe what happens.

Play the role of a rather ill-mannered customer, buy a few items, pay with a ten-dollar note (corresponding), receive your change without checking it immediately, but look at it while you are on your way out, then stop and turn around and say: 'I gave you fifty dollars, but you only gave me change for ten dollars'. If the salesman argues with you, insist for a minute or so, and then leave.

4) Explain to participants that this was the first part of the role play. The next is an analysis of the performance. The observers and the trainer should now con tribute and help the salesman, and themselves, learn something from the play. First ask the 'actor', then the observers, to comment on the behaviour of the salesman and on the salesman's way of dealing with the particular problem:

- How did the salesman treat the customer? Did he greet him properly?

- Was he careful? Did he hand over the change properly? What mistake was made? (Demonstrate the correct procedure, see the MATCOM Element 'Handling of cash').

- Did he behave correctly in the problem situation? Did he show any impatience? Did he manage to solve the problem?

5) When the analysis has been concluded, tell participants that the example has illustrated some of the advantages of role plays:

- Role plays can be used to improve 'human interaction skills' and trainees can experiment and prac-

tise in a 'safe' surrounding. It is better to make the mistakes in the classroom than on the job.

- Trainees will learn to appreciate the importance of feelings and emotions in many problems associated with human relations.

- By playing the role of 'the other side' trainees will learn to see a problem from different perspectives.

- No special arrangements or equipment are needed.

6) Point out the difference between a role play and a demonstration. In this role play the salesman was required to act without knowing in advance what problems he might face, like in a real situation. If the actors had rehearsed exactly what to do and say, instead, we would have had a demonstration of the correct behaviour, which is another useful training method.

7) Point out that a common problem when using role plays is that both observers and players may get so exhilarated by the 'show' that the learning opportunity is lost. The approach used for the first play to be performed in a group is therefore crucial.

8) Emphasise that the play just performed was a very short and simple example; other similar but more comprehensive exercises may be used in the training of managers in sales negotiations, interview techniques, meeting techniques, etc. Often role plays are used to depict more complex and problematic human relations, e.g. disputes within management groups, management-staff conflicts, handling complaints from customers, etc.

9) Tell participants that you want to demonstrate one of the many role plays used in the MATCOM courses; one which is intended to train managers in explaining com-

plicated matters to members. Explain the background: a group of farmers want to borrow money to dig a well, and they have been told that the co-operative will charge a high interest for the loan. They say they cannot understand this, and it is now the task of the management to explain the matter to them.

10) Appoint three or four participants to play the roles of the farmers and two who will play the role of the manager and the credit officer of the co-operative. Give the respective briefs to the players, and ensure that neither group has the opportunity to see each other's briefs. Allow the role players up to fifteen minutes to 'think themselves' into their roles and discuss their negotiating strategy – preferably in two separate rooms.

While they are doing this tell the remainder of the participants that they are to observe the negotiations. Ask them to write down as many arguments as they can that they might use to explain interest charges to someone who cannot see the reasons for them.

11) Arrange a table with chairs for the borrowers on one side and for the society officials on the other. Invite the role players back into the room and give them up to twenty minutes to play out the negotiation.

The manager and the credit officer can consider that they have succeeded if the farmers finally accept that they should pay interest charges.

12) After the negotiation has been completed first ask the role players to describe how they felt. Did the farmers feel that the managers sympathised with their problem and were trying to help them understand? Did the managers feel that the farmers were unable to understand interest, or that they were pretending in order to attempt to reduce the charge that would be

lieved against them?

13)   Ask the observers to comment on the negotiation. They
        should introduce any arguments which they have noted
        down which were not used by the lending side and
        should discuss whether it would have been useful to
        employ them.

        Ask participants what the most important thing is that
        a co-operative credit officer should do when attempt-
        ing to deal with any objections from a prospective bor-
        rower. (The most important is not what the officer
        says. He should <u>listen</u> to what the farmer says and re-
        spond to it accordingly.)

14)   When the analysis has been concluded, review the whole
        procedure for the role play:

        -     First, the trainer describes to all trainees the
              situation which is the <u>background</u> for the role
              play.

        -     The trainer then explains the <u>purpose</u> of the ac-
              tual role play. All trainees must be aware of the
              issues which are subject to training and know what
              to focus their attention on.

        -     The role players are given their ' <u>briefs</u>', i.e.
              the additional information which is necessary for
              them to play their roles. The briefs can be given
              in writing, verbally, or both. The trainer must
              help the players concentrate on the content of the
              situation and alleviate any anxiety. The players
              must have sufficient time to prepare and 'think
              themselves' into their roles. In the meantime, the
              observers may be further informed about the pro-
              blems involved in the situation.

        -     The players <u>act out</u> the situation. The dialogue
              will be made up by the actors as the situation
              develops and in accordance with their briefs.

- At the end of the scene the trainer leads a <u>discussion</u> for the purpose of providing feedback. Players and observers analyse what has taken place, why the people involved behaved as they did and which alternatives would have been possible.

- The trainer stresses the positive behaviour demonstrated by the players and makes a <u>summary</u> of the learning experience.

- The play can be <u>repeated</u> with new players, or with the same players in reversed roles.

15) Ask participants to suggest any problems connected with role plays, and elicit the conclusion that the result and effectiveness of a role play depends to a great extent on the ability of the leader to control the whole process, including:

- applying the method only when it is useful,

- careful planning and preparation of the 'case' which will form the background for the play,

- adequate briefing of the players, instructing them in order to achieve a realistic dialogue and a proper tempo,

- intervening, if necessary, to avoid an unproductive development of the play (this must be done without indicating any personal failures whatsoever),

- leading a meaningful discussion for the analysis and making good summary of the learning experience.

16) Emphasise the importance of managing the feedback (the concluding discussion) in a careful way, and stress particularly the following aspects:-

- The participants' self-esteem must be maintained in all circumstances, it is a responsibility of the trainer to see to this. Excessive negative

feedback is not helpful.

-    All feedback must be relevant to the training ob-
     jectives of the role play, other sorts of comments
     may be taken as offensive.

-    The observers should be asked to be exact and spec-
     ific when citing the players (a tape recorder may
     be useful), and not to generalise. Instead of say
     ing 'You were rude to the farmers all the time',
     it is better to be specific 'When he asked you
     about the collateral you said you had explained it
     already.'

-    The trainer should encourage the observers to give
     constructive and positive comments, e.g. 'You said
     that many other farmers understand interest, maybe
     you should have given some examples of other suc-
     cessful loan projects with details about the inter-
     est?'

17)   Supplementary exercise:

For further demonstration and discussion of the role
play method, assign one of the participants the task
of leading a session - including a role play - during
one of the following days. Let the participant choose
a suitable topic within his own speciality, or take
one from the MATCOM material, e.g. 'Management of
Larger Agricultural Co-operatives', Session 5.2 or
'Rural Savings and Credit Schemes', Session 11.2 (se-
lected parts).

After the session, make the usual evaluation, and also
consider the aspects mentioned in Points 14 - 16
above.

Extract from ILO-MATCOM:
'Rural Savings and Credit Schemes'

Farmer's Brief.

You are one of a group of farmers who have applied to their
co-operative for a small group loan of $1,000 to dig a
well. None of you has borrowed money from an official sour-
ce before. Your application has been processed by the man-
ager, and when he mentions that you will be charged 15% in-
terest for the three-year term of the loan you demand an ex-
planation; you have never heard of interest being charged
in this way before.

You think that if you protest enough the society might
waive the interest payments, so you are not going to give
up the point easily.

You have discussed the problem among yourselves at length,
and the following points have been made:

-    The co-operative society is owned and controlled by
     its members; it should not charge them for what be-
     longs to them in any case.

-    The government provides money to the society. Why
     should the society charge members for it since they
     are taxpayers like everyone else?

-    Members' investments are contributing to national deve-
     lopment and increased agricultural production which is
     government policy. Members should not be discouraged
     by interest charges from doing what the government
     wants.

-    Most co-operative officials are paid by the govern-
     ment. Why should they take members' money as well?

-    Possibly the society is seeking a bribe; members must
     be alert to any behaviour of this sort by officials of
     their own society.

You are about to meet with the society's manager and credit
officer in order to discuss your loan.

Extract from ILO-MATCOM:
'Rural Savings and Credit Schemes'

Co-operative Manager's and Credit Officer's Brief.

You are to conduct a routine interview to explain the con-
ditions of a loan which has been approved in principle. The
borrowers are a group of members who propose borrowing
$1,000 for three years to dig a well. When you previously
mentioned the interest rate they were most indignant, claim-
ing never to have heard of interest being charged in this
way before. You are about to meet them; you should try to
explain to them, in terms they will be able to understand
and accept, exactly why you are charging interest and any
benefits they are getting for their money.

Remember that the farmers have something to gain by remain-
ing ignorant. If interest cannot be explained to them they
may well think they will get away with not paying it. Also
remember that you will not convince them just by telling
them the rules and regulations. To really understand the
point, however reluctantly, they need to be able to relate
it to ideas that are already familiar to them.

You have various ideas about how you might explain the prin-
ciple of interest to the group of farmers, including the
following:

-    You might relate the charging of interest to something
     that farmers are familiar with such as charging rent
     for land.

-    You can explain the various ways in which the society
     is serving its members by providing technical advice
     as well as loans. This costs money and must be paid
     for.

-    You can remind any members who have savings deposited
     with the society or elsewhere that they expect inter-
     est on their savings; the co-operative does not act
     any differently.

SESSION 4.6

THE IN-BASKET EXERCISE

Objective :   To enable participants to plan and conduct an
              'in-basket' exercise.

Time :   1 hour (+ maximum 3 hours for a supplementary
              exercise.)

Material :   For the supplementary exercise (Point 15): ILO-
              MATCOM manual 'Work Planning'.

Session Guide

1)   Show participants a basket or tray of the type often
     found on a manager's desk, marked 'in' and 'out' and
     describe a typical situation in a co-operative man
     ager's worklife. On his arrival at the office after
     some days' absence he may find the 'in-basket' full of
     papers and the first thing he does is to go through
     the bunch of papers and decide how to organise his
     day.

     Describe a set of typical in-basket documents to parti-
     cipants (for instance those included in the MATCOM man-
     ual 'Work Planning', Session 5.1). 'Here is a com-
     plaint from an angry member, another complaint from a
     rice mill concerning the rice quality, a memo from the
     auditor – he is waiting for the accounts, the secret-
     ary is reminding him of some out-of-stock problems and
     that a salesman wants to see him urgently, an attend-
     ant has left a note that he had to leave suddenly
     because of a funeral, a driver is worried because he
     has damaged the truck, the bank writes that they must
     have the loan application immediately, etc. etc.' Cir-
     culate the documents in the class for participants to
     study.

2)   Explain that someone had the idea of taking a typical

in-basket from a manager's desk and putting it in front of a trainee. With some supplementary background information the basket would be like a case study or role play. The trainee could be asked to go through the contents of the basket and deal with the issues, for the purpose of training.

3)   Identify in a discussion the purpose and advantages of such an exercise:

-    To a large extent it would be job-oriented, close to practice.

-    Trainees will practice setting priorities and taking decisions.

-    It is an interesting exercise, creating motivation for learning.

-    An in-basket exercise can also be used to uncover training needs. It could also serve as a tool in recruitment procedures (to find out about atti tudes and abilities of the applicants) and as part of a final test after a management training programme has been completed.

4)   Point out that an in-basket exercise consists of three important parts when used for training purposes:

A.   The trainees are given the <u>background</u> and the necessary set of <u>instructions</u> for the exercise.

B.   The in-basket is presented to the trainees and they <u>take action</u> (Usually trainees work individually, each one has a set of papers).

C.   When the allotted time has expired, all the issues involved are <u>discussed</u> in a general session and the action taken by trainees is evaluated.

Discuss the above three points - one by one.

5)   Point out that the background should be presented in about the same manner as that for a case study or a

role play, containing information of importance for decisions trainees will have to take. A complex and lengthy exercise may require written information comprising documents such as organisation charts with staff lists, area maps, financial statements, etc. In simpler cases it may be sufficient to give a verbal briefing.

6) The trainees should also be given clear instructions about all practical matters, e.g. they should write down which issues they deal with, and in what order. If they decide to write a memo they must actually write it out and if they decide to talk to someone they must note on a paper what they intend to say. There should be a written record of every action at the end of the exercise.

7) The trainees should also be informed about the time available for the exercise. This is often done in a realistic, dramatic way, e.g. 'The time is now 8 a.m. You have just arrived at the office and you find the in-basket full of papers as usual. You had better go through them immediately, at 10.30 you have to attend a committee meeting.'

8) Discuss what kind of documents the in-basket should contain in order to make the exercise as useful as possible. Elicit the following:

   - The basket should contain a mixture of various documents: inter-office notes, memos, reports, letters from members, customers, suppliers and various outside organisations.

   - The content should be realistic, and the documents should also look real (use various sizes of papers and different handwritings and typewriters, produce real-looking letterheads, forms and memos.)

   - The papers should have different degrees of sig-

nificance. Some should be of vital importance and require immediate and wise decisions, others could be less important and still others rather trivial (included more to create a realistic atmosphere). The intention is that the trainee should be forced to identify the most urgent items and set his priorities.

- Many small 'tricks' can be used when designing the contents of the basket in order to create a more effective learning situation.

    Include more items in the basket than trainees can possibly deal with in the period of time allotted for the exercise.

    Make some of the items related so that some matters must be attended to before another crucial problem can be resolved. (e.g. Cause the trainee to take certain decisions before preparing some papers needed before reporting to the chairman).

    Include petty matters which are urgent (e.g. s-igning a purchase order for typewriter ribbons), and important matters which are less urgent (e.g. paying a loan due in two weeks).

    Include some letters with requests that require carefully worded rejections (e.g. requests for credit; this will test the ability to write politely under time pressure).

    Include items which can be delegated to subordinates.

    Include items for approval or signing (e.g. reports or letters drafted by the secretary), which contain errors and do not really qualify for approval.

9) Discuss how the follow-up should be organised:

- The documents are collected from the trainees.

These should now clearly reflect what action (and decisions) they have taken, so that the trainer, after the session, can make an evaluation and give individual feedback to each trainee.

- Immediately after the exercise the trainer should lead a discussion with all trainees in order to elicit the main learning points. Each item in the basket should be analysed. Trainees should report problems they encountered during the exercise, e.g. which items did they classify as important, which were delegated, postponed or ignored; what action did they take immediately, etc. The trainer should encourage an exchange of views from all trainees.

- Trainees should be told that there may be several good solutions to the problems. What is important is that they have some good reason for their own decisions and that they feel that they have been practising useful skills.

10) Supplementary exercise:

Divide participants into two groups, different subject matter specialists should be represented in both groups. Give both groups the assignment to produce a set of documents for an in-basket exercise as well as the necessary background information. Ask the groups to appoint a co-ordinator/chairman and arrange that all necessary stationery and typing equipment is available. Allow 1 1/2 hour for the group work.

11) Hand over the sets of the material produced by one group to the other group, including written background information, and vice versa. Instruct the groups that they should now take action on the material they have received (see para 6 above), but each group should work as a 'management team', not as individual managers. Therefore, they should first circulate all the

documents within the group, then discuss and agree on which action to take. Inform participants how much time is available. Carry out the two in-basket exercises simultaneously.

12) When the time has expired ask participants to stop, even if they have not completed the assignment. Ask them to write a brief comment on the material pro vided, stating particularly which items they found confusing and difficult to deal with.

13) Collect the written comments for later use.

14) Conclude the exercises in the manner described in Point 9 above with a member of the group who designed the exercise as leader of the discussion, in each case.

15) The course leader and/or some appointed participants should carry out a final editing of the two sets of material - for future use in the training centre. The comments provided by participants under Point 12 should be considered.

16) <u>Alternative supplementary exercise</u>:

Let one or two participants conduct the in-basket exercise described in the MATCOM manual 'Work Planning', Session 5.1, Points 8 - 10. This is a simplified exercise, requiring trainees to rank the items in order of priority only, not to take any action.

SESSION 4.7

THE APPLICATION PROJECT

Objective: To enable participants to plan and use appli-
                 cation projects in co-operative management
                 training.

Time: 1 1/2 hours.

Session Guide:

1)   Remind participants about the progression in our re-
        view of training methods in this course: starting with
        the lecture method, we then dealt with other ways of
        making training closer to real life in a co-operative
        society - such as exercises and case studies on really
        job-oriented matters; role plays and in-basket exer-
        cises which engage the trainees in close-to-real work
        situations and simulate total decision making se-
        quences.

2)   Point out that we cannot possibly come closer to real-
        ity and still remain in the classroom. The next obv-
        ious step is to take trainees from the classroom to
        the cooperative society office for further training.
        Elicit the various possibilities:

        -    a study visit,

        -    an 'application project' in which trainees are to
             study a particular problem in a co-operative, sug-
             gest a solution, and possibly also implement the
             suggested actions,

        -    on-the-job training.

3)   Remind participants that the study visit will be dealt
        with by one of the participants as a lecture assign-
        ment (ref. Session 3.9), and that the choice between
        classroom and on-the-job training must already be made

when the curriculum for a course is fixed (ref. Session 2.3 Points 9-10). The remaining alternative, the possibility of complementing classroom training with practical applications in 'live' situations in cooperative societies will be the subject for this session. We will discuss how such projects should be planned for maximum effectiveness from a training point of view.

4)   Refer to the previous discussions on this theme. In Session 2.4 it was shown that a training programme could be a combination of formal shorter courses and practice periods in co-operatives.

5)   Give a brief description of an application project in order to clarify any possible misunderstandings, e.g.:

-    Towards the end of the course a trainee in a co-operative management course is given the assign-ment to study how a selected co-operative society has organised its transport services. After a thorough analysis the trainee identifies some problems and works out a proposal for improved services. This is presented to the trainer and to the society management. The proposal may be implemented by the society. The project is thus useful both for the society and the trainee.

6)   Ask participants to mention which issues are important for a successful application project. Note their sug-gestions on the chalkboard, including at least the following:

-    Individual or group work?

-    Selection of a host society.

-    Selection of a project (topic, problem).

-    Planning of the work.

-    The role of the trainer.

- Presenting the proposal.

- With or without implementation?

- Evaluation.

7) Divide participants (except one who will later lead discussion) into groups of 4-6 persons. Ask them to discuss the listed issues for forty minutes and pre pare to report their conclusions in the form of a "checklist" for application projects.

While the group discussions are in progress, brief the excluded participant on his role as leader of the ensu- ing plenary session.

8) Reconvene the participants into a plenary session and ask Group 1 to present their conclusions under the first issue and the other groups to complement or raise questions. For the next issue let Group 2 answer first, etc.

Ensure that the following points are made. Note key words on the chalkboard.

Individual or group work?

- Both are possible, depending on the scope and na- ture of the project.

Selection of host society.

- The management of the host society must of course be positive and willing to support the trainee in his work. For several reasons, the trainees' own employer may be the best choice.

Selection of project.

- If possible the trainee should play the key part in identifying and selecting a project, but it should be done in close collaboration with the

trainer and the host organisation. The trainer
should make sure that the project is suitable from
a training point of view: sufficiently demanding
and realistic but not too complex and time-consum-
ing; not 'artificial' and meaningless.

- The host society should not be forced to leave out
  a 'sensitive' problem which they prefer to deal
  with themselves, they should ensure that they can
  provide all needed background information.

Planning the project.

- A tentative timetable should be prepared for: the
  trainee's work, periods of research, interviews
  and meetings. A date for delivery of the first re-
  port should also be fixed.

- This should be followed by a period for the pre-
  paration of suggestions for solution(s) to the pro-
  blem. A date can also be set for the presentation
  of the proposal.

- Practical and financial arrangements (transport,
  accommodation, etc.) should be agreed on.

The role of the instructor.

- The trainer is responsible for the smooth implemen-
  tation of the work. He should keep in touch with
  both the trainee and the host society throughout
  the period and provide assistance when needed.

Presenting the proposal.

- The method and format for the presentation of the
  project report should be tentatively agreed upon
  at the beginning of the project. The content
  should be specified, e.g. analyses, appraisals of
  alternative solutions, time schedule for implemen-
  tation, etc.

With or without implementation?

- The value of the project (from a training point of view) increases if the proposals are implemented, particularly if the trainee is offered the opportunity to take responsibility for implementation.

Evaluation.

- If the project is successfully implemented (for the benefit of the host society) it usually indicates that both the project itself and the training experience have been useful.

- If a trainee is not involved in the implementation of proposals, the trainee should in any event, be informed of the results.

- If a project implementation does not result in the expected improvement it is important to identify the reasons and to inform the trainee of the outcome.

9)   Sum up by referring to the key words on the chalkboard and arrange that a 'checklist for application projects', (based on the groups' joint reports) is typed out, copied and distributed to all participants as soon as possible.

session design

SESSION 5.1

REVIEW OF METHODS

Objective :   To enable participants to compare and assess
               the effectiveness of the common training me-
               thods, considering the application of import-
               ant principles of learning.

Time :   1 hour.

Session Guide :

1)   Draw the table below on the chalkboard or flip chart
      without filling in any text or figures.

Application of some principles of learning
in training methods.

Method:	On-the-job training	Lecture	Discussion	Case study	Role play	Reading assignment
Principle:						
Motivation	3	2	2	2	2	1
Active involvement	3	1	2	3	3	2
Individual approach	3	1	2	2	2	2
Sequencing	2	3	1	2	1	3
Feedback	3	1	2	2	3	1
Transfer	3	1	1	2	2	1

Rating: Good   = 3 points
            Average = 2 points
            Weak   = 1 point

(This table is an extract from ILO:TTMM)

2)   Remind participants about the discussion of the learn-
     ing principles in Session 3.3. Suggest a repetition
     (point out that 'repetition' is one of the learning
     principles); ask participants to recall these prin-
     ciples and note them in the table.

     Ask participants to recall all the training methods we
     have discussed in the course so far, and note the main
     ones in the table.

3)   Refer to the handout 'A brief guide to training me-
     thods', distributed in Session 3.1. Point out that the
     paper can be used to review the features of the vari-
     ous methods.

4)   Recall what was said about the lecture method in
     Session 3.3 and fill in the figures in the table
     accordingly.

     -   Lecturing allows full control of sequence and
         structure (3 points).

     -   A good lecturer may be able to create interest and
         motivation for the topic (2 points).

     -   Lecturing is a weak method with regard to active
         involvement, individual approach, feedback and
         transfer (1 point).

5)   Ask participants to copy the table and to assess, in-
     dividually, the other methods in the same way. When
     they are ready, ask one participant to describe how he
     has rated the method of 'on-the-job training'. Ask
     other participants for their opinions, discuss and
     comment, give examples as necessary. Figures other
     than those given as guidelines in the table above may
     of course be justifiable. Ask another participant to
     comment on the next method, discuss in the same way,
     and so on until all methods have been reviewed.

6)   Sum up the comparison of the methods by reading the

table 'the other way'; check which method is rated highest with regard to motivation, active involvement, transfer, etc. As a conclusion, emphasise that most learning principles apparently are applied to a higher degree in the participatory methods than in lecturing and reading assignments.

7) Warn trainees that a teacher cannot choose training methods just on the basis of this table. It is, of course, impossible to add up the score of each method and only use the one with the highest rating. Stress that the table ~~is nothing but a theoretical assessment of certain characteristics.~~ Point out that the choice of methods (and media) must be based on many considera-tions and that to choose the right one a trainer also needs the knowledge contained in the table.

8) Ask participants to suggest which factors influence the choice of training method and to give examples for their suggestions. Elicit the following:

-   The subject and the objective.

    The choice of method is sometimes quite natural be-cause of the training objective and the subject area. To train book-keeping it is obvious that exercises are more effective than lecturing. Role plays are natural for training face-to-face com-munication while a short lecture or a study text for reading may be natural ways to convey some simple facts to trainees.

    On the other hand, a topic such as 'How to read a balance sheet' can be properly taught in many dif-ferent ways, e.g. through lecture, reading, cases, exercises, etc.

-   Cost.

    Participatory methods usually requires more time for preparation and implementation than lectures

and talk sessions. For example, the learning ef-
fect of a 'case study' on certain marketing pro-
blems may be better than if a trainer-led discus-
sion is used. But is it worth the extra cost?
(Cost in this context implies the instructor's and
the trainees' time.)

- The length of the course.

An 'application project' may be suitable for a sub-
ject such as transport management but unsuitable
in a course of short duration since the method is
time-consuming.

- The time of the day.

To use the period immediately after lunch for a
long dreary lecture is effective only if the aim
is to let trainees sleep, they are already drowsy
- especially in warm climates.

- The trainees.

Trainees' experience and education make certain
methods suitable for certain issues. Experienced
managers, for instance, will benefit from a discus-
sion on 'public relations' while young trainees
may learn better from a lecture or a case study on
the same topic.

It is sometimes suggested that the traditions and
culture of a country make certain methods unsuit-
able because trainees are not used to the 'confron-
tations' which may be a necessary part of discus-
sions, role plays and business games.

The simple fact that trainees are not used to
group work and collaboration may also be a hin-
drance in the same way.

It has been proved by many instructors, however,
that such obstacles can easily be removed by a
careful step-by-step introduction of these me-
thods.

9)   Tell participants that studies and experience has
      shown that management training, which aims at develop-
      ing many different skills, is most effective when a
      combination of training methods is used. The examples
      in the following sessions will demonstrate this ap-
      proach.

SESSION 5.2

SESSION DESIGN IN PRACTICE

Objective: To enable participants   to apply an adequate
              technique when planning a training session.

Time: 2 1/2 - 3 hours.

Material: The MATCOM booklet 'Leakage' (at least one
              copy, preferably a copy for each participant).
              Handout 'Session plan'.

If possible, arrange that all participants read the MATCOM
booklet 'Leakage' before this session.

Session Guide

1)   Ask participants how much time on average they use for
      planning a training session. Discuss possible reasons
      for the differences, mention the following aspects:

      -    Naturally, much more time is needed for the first
           performance; when a trainer has given the same ses-
           sion several times he needs less preparation time.

      -    Trainers have different personalities and diffe-
           rent working styles, some need and like to have a
           detailed plan, others don't.

      -    Different subjects require different amounts of ex-
           ercise material, etc.

      -    Different training methods require different time
           for planning.

      -    Some trainers only prepare 'mentally' and do not
           spend time writing down their plans. For every
           hour of instruction they may need only a few hours
           of preparation (for the first performance) and
           even less when the session is repeated. If the

session plan must be written out in detail (so that even another trainer can understand and use the same plan as in the MATCOM manuals), the preparation will take a much longer time. Professional training designers estimate that more than 50 hours of 'production time' will be needed for each hour of instruction. This includes design, evaluation and production of a Trainers Manual, and material for the trainees.

2) Stress again that no two trainers take the same approach when planning a training session. For the purpose of providing <u>one</u> model, however, you will now demonstrate the way <u>you</u> work.

Use the following example, based on the topic 'leakage' or any other example you prefer in which a variety of methods can be applied.

Write up your 'session plan' on the chalkboard, flip chart or ohp, step-by-step, as you present your approach. (See the handout.)

3) Ex plain to participants that you are going to plan a session on 'leakage' included in the topic 'stock control' in a course for shop assistants. Tell partici pants that you will describe your approach, step-by-step as follows:

4) First, I consult the curriculum or the <u>syllabus</u> for the actual subject.

- I want to know the predetermined objective. Let us assume that it is worded as follows in the syllabus: 'to enable trainees to describe generally the leakage problem in a retail store and to identify their own responsibilities in this context'.

- The syllabus also states the time available: three session only. I write down the objective in my session plan. (Show on chalkboard, flip chart or ohp)

5)   I consult my <u>resource material</u>.

- I look for two types of material, books to refresh
  my knowledge on the subject matter, and material
  that can give me ideas about possible training me-
  thods.

- My own old session plans may be used again, if
  available.

- I visit the college library which has several
  books covering the topic of leakage and the train-
  ing materials centre where I may find useful les
  son notes, handouts, case studies, transparencies
  and other visuals filed by other teachers after
  previous courses.

- Among the MATCOM material I find a booklet on leak-
  age intended for trainees' self-studies and a
  session plan on leakage in the manual 'Retail man
  agement'. Compared to other books, these MATCOM pu-
  blications also offer suggestions on teaching me-
  thods in addition to the subject-matter content.

6)   I decide the <u>contents</u> of the session.

- Having consulted some books (and keeping my objec-
  tive in mind) I decide to include the following
  'learning points':

  1 - what is leakage? (definition).

  2 - how to measure leakage in a shop.

  3 - common causes of leakage.

  4 - consequences of high leakage.

  I have not included the most important point: 'how
  to prevent leakage', but that can only be learned
  on-the-job after I have taught the theoretical
  background in the classroom. Thus, the training ob-
  jective stated in the syllabus is realistic.

7)   I decide the sequence of the learning points. I see no reason to change the order suggested above.

8)   I select the most suitable training method for each learning point. As I make up my mind I write down the activities and the estimated time needed in my session plan.

   -   When I study the two MATCOM books mentioned above I consider using one of them as a basis for my session. The manual 'Retail Management' contains a ready made plan but it is intended more for managers than shop assistants. The booklet 'Leakage' contains some illustrations which I can copy for the ohp and some useful 'mini cases'. Therefore, I decide to pick useful parts from both sources and design my own session, suited exactly to my trainees.

9)   The first learning point: What is leakage?

   -   I should not fall into the trap of starting with a theoretical definition (there is one on page 8 in the MATCOM booklet). I must remember the principle of motivation and try to make trainees curious and want to learn about leakage.

   -   On page 5 in the booklet there is a short story (a mini case) about a market vendor called Charlie. It gives, in a nutshell, a vivid and easily compre hensible explanation of the leakage concept. I decide to use this story as an introduction to the session. Thus they will get the definition of leakage through a realistic example. I will use the same illustration as in the booklet, drawn by myself on the chalkboard, or shown on the ohp. I note this in my session plan.

10) The second learning point: How to measure leakage.

   -   The trainees must be convinced that leakage can be

discovered and measured. The best method is to <u>de-monstrate</u> how it is done. Charlie's sales and leakage could be used in a first simple example.

- A more realistic example with continuing sales and stock replenishment like in a shop is then needed. A short <u>exercise</u> on how to keep a stock control register should be done. I can use the example on pages 9-10 in the booklet, trainees will copy it.

- To show that the amount of leakage should be expressed as a percentage of sales I can use the approach on page 12 in the booklet, and add a few more calculation examples which I have formulated.

- I fill in my session plan accordingly.

11) The third learning point: <u>Common causes of leakage</u>.

- This is an important point. The trainees will be the key persons for leakage control in their shops. Therefore, they must learn now where and how leakage may occur. Gradually they will learn on their jobs how to minimise leakage in their practical work.

- Many training methods are possible: I can give a <u>lecture</u> supported by realistic <u>visuals</u> (slides or videos) from local shops; trainees may identify the leakage causes themselves in a <u>group discussion</u>, or we can study the handling of goods and identify the leakage risks during a <u>study visit</u> in a shop. For various reasons (practical and economical) I decide to use the ' <u>talk method</u>' to identify the different, causes beginning with a <u>brainstorming</u>. On the basis of our discussions I will let trainees make up a list of basic rules for prevention of leakage. This can be supported by a set of transparencies made up from the illustrations in the booklet.

- When trainees have been involved in this listing

of rules, a <u>ranking exercise</u> will reinforce the
points learned, and help them remember.

-   I add these activities to my session plan.

12) The fourth learning point: <u>Consequences of leakage.</u>

-   I must convince trainees about the perils of leak-
    age. They must learn that high leakage can totally
    destroy a business. The best method would be to
    refer to a true local case as a warning. If one is
    not available I can still use the story on page
    18-19 in the MATCOM booklet for the same purpose.

-   In the MATCOM material there is also a <u>case study</u>,
    comparing three managers with different attitudes
    to leakage (in the booklet on page 27 and in the
    manual Session 7.1, Point 8). I decide to use this
    in a <u>group discussion</u> to emphasise that control of
    leakage is just one of a manager's many important
    tasks.

-   I add these points to my session plan.

13) Summing up

-   A suitable conclusion to the session may be to ask
    the trainees what they will think about, and do,
    in order to prevent leakage when they come back to
    their shops after the course.

14) With reference to your now completed session plan ex-
     plain to participants that your demonstration of the
     planning was, of course, 'condensed'. What now took
     half an hour would in a realistic situation have taken
     at least three or four hours - including your search
     for resource material, studying it, choosing proper me-
     thods, preparing transparencies and writing out your
     plan.

15) Distribute copies of the session plan to participants.
     Ask them to comment on your approach, particularly the

choice of methods. Explain and discuss as required.

16)   Tell participants that the session on leakage will now
       be conducted, with themselves as 'trainees', to give
       them a chance to assess if the planning was adequate.

       Conduct the session in accordance with the plan. Note
       that the case study about the three managers in the
       last part of the session need not be conducted again
       (it was used for group discussion practice already in
       Session 4.2. Immediately after the session ask partici-
       pants to assess the effectiveness of the various activ-
       ities, reviewing and discussing each learning point.

SESSION PLAN

SUBJECT: Stock control.   TOPIC: Leakage.

OBJECTIVE: To enable trainees to describe generally the
                leakage problem in a retail store and to iden-
                tify their own responsibilities in this con-
                text.

TIME: 3 x 45 min   MATERIAL: Visuals (ohp) from the
                                     MATCOM booklet 'Leakage'.

Learning point	Activities	Ref. Material	Min
Intro-duction, defini-tion.	Tell stories about Charlie. Discuss reasons for his problem. Define 'leakage'.	Leakage, p.5 Visual	10
To measure leakage	Demonstrate calculation of Charlie's leakage, 2 ex-amples	P.6 chb	5
	Compare market stand with shop, discuss problems of detecting leakage in shop. Explain 'stocktaking' and 'stock control book'.		5
	Show page from stock con-trol book.	P.9 flc, ohp	
	Go through example from booklet.	P.9-10	10
	Compare measures of leak-age in money terms and in percentage of sales. Go through calculations in booklet.	P.12-13	10
Causes of leakage	Refer to Charlie's leakage. Brainstorm to find more causes. Note all on chalk-board (chb).	P.14-17 chb	5
	Elaborate on each cause. For each one formulate a rule to avoid leakage.	ohp visuals	20
	Ranking exercise: which rules are most important in my shop? Compare opinions.		
Conse-quences of leakage.	Relate story from booklet.	P.18-19	5
	Conduct the case study 'The best manager'.	P.28	40
Summary.	An action commitment: What will trainees do to reduce leakage when they are back in their jobs?		10

SESSION 5.3

SESSION PLANNING EXERCISE

Objective: To enable participants to make appropriate
              choices of training methods in different train-
              ing situations.

Time: 2 - 2 1/2 hours (+ 3 hours for supplementary exer-
              cise).

Session Guide:

1)   Remind participants about the discussion in Session
      5.1 Point 8 about factors which affect the choice of
      methods. Also refer to the demonstration of session
      planning in the previous session and point out that a
      trainer should always (even after long experience) ap-
      ply a systematic approach when planning his sessions -
      including the necessary analyses and considerations.
      He should never drift into a 'mechanical' application
      of old well known methods as a matter of routine.

2)   Tell participants that they will now get an opportun-
      ity to practise the choice of methods and planning of
      sessions, working in groups.

      The groups should apply the planning procedure demon-
      strated in the previous session. Review that pro-
      cedure; elicit from participants the steps involved
      and write a list, of key words on the chalkboard. Ask
      participants to use it as a checklist during the group
      work:

      A.   Write down the objective of the session?.

      B.   Write down the learning points. What subject-
            matter content should be covered?

      C.   Consider which sequence of the learning points is
            the most effective from an instructional point of
            view.

D. Plan an <u>introduction</u> which will create interest for the topic and motivation to learn.

E. Consider which <u>training methods</u> will be most suitable for each of the learning points.

F. Include <u>exercises</u> if new skills or knowledge need to be practised. Consider other ways of increasing trainees' <u>participation</u>.

G. Choose an effective method for a making a <u>summary</u>.

H. Consider the <u>timing</u>.

I. Write out a clear <u>session plan</u>.

3) Give the following complementary instructions:

- The groups will themselves decide the topic for which they will make a session plan, as well as defining the target group.

- The groups will also determine the objective of the session themselves if a relevant curriculum or syllabus with specified objectives is not available.

- The planned session should not last more than 90 minutes.

- The groups should write out their session plans on flip charts or on ohp transparencies, or distribute copies to all participants if this is possible.

- The groups may choose the layout and format they prefer for their session plans.

- All group members must be prepared to present the plan in a general session that will follow.

4) Divide the class into 'specialised groups', i.e. each group should consist of participants with the same specialisation so that they can all contribute in the design of a session dealing with a particular topic.

Preferably there should not be more than four members in each group. Allow up to 90 minutes for group work.

In case the groups have problems selecting a suitable topic suggest one of the following:

General management:

-    Staff recruitment procedures.

-    Choice of crop storage method.

-    Insurance.

Financial management:

-    Sources of funds.

-    Liquidity.

Co-operative knowledge:

-    Members' rights and duties.

-    Keeping members informed.

5)   Reconvene the groups and select a member from one group to present their plan.

      After the presentation ask for comments from the other groups. Discuss the issues included in Point 2 above, and pay particular attention to Items D, E and F under Point 2.

6)   When the methods have been discussed suggest a look at the forms the groups have used for writing out their plans. Also refer to the form used for the session plan on leakage in the previous session.

      Discuss the layout and contents of the forms: are all necessary points included. Are there any unnecessary items or columns included?

      Point out that the brief types of session plans we

have seen examples of are, in any case, intended only
as an aid to memory for the author himself – nobody
else can use it with a predictable result. Demonstrate
a page from a MATCOM manual as an example of a session
plan which is so detailed, however, that it can be
understood and used by any instructor.

7)   Supplementary exercise:

Give participants more time (3 hours) to practice
choice of methods and session planning, this time as
an individual exercise.

Various procedures for the follow-up of the exercise
are possible, depending on the time available and the
composition of the class. Presentation of the plans
could, for instance, be done in smaller groups of par-
ticipants with the same specialisation; they would
then get an opportunity to discuss common teaching
problems and help each other to design effective
sessions. The groups should be reminded about the
issues to watch as outlined in Point 2 above.

evaluation

SESSION 6.1

BASIC EVALUATION TECHNIQUES

Objective: To enable participants to apply adequate tech-
             niques for the evaluation of sessions and cour-
             ses.
             (An evaluation of this course is integrated in
             this and the following session.)

Time: 1 hour (+ 1/2 hour for supplementary exercise).

Material: Handout 'Course Review Form'.

Session Guide

1)   Compare the situations of a business manager and a
      training manager:

      -    The business manager must present his books at the
           end of the year and the 'bottom line' must show a
           good return on the money invested in the business.
           If he fails the auditors will scrutinise every
           little detail of his operations and he will have
           to improve the result or look for another job.

      -    The training manager also presents his 'books' at
           the end of the year but this is no problem because
           he need not show whether he has made a loss or a
           profit. Fortunately,   for him, the top management
           is happy to know just how much money he has spent
           and how many 'customers' (trainees) he has had in
           his training centre. Whether or not there is a re-
           turn on the invested money nobody wants to know...
           not even the auditors.

2)   Discuss the problems of 'accountability' for a train-
      ing manager. Is the situation described above true? If
      so, is it satisfactory? Participants may refer to the

evaluation which is usually conducted after each training courses. Elicit the following points:

- It is in everybody's interest to find out the results of training activities. The training manager and his team of trainers are anxious to do a good job and they need a course evaluation mainly to identify the weak points, to overhaul poor programmes and to make the good ones even better. The top management's main interest is proof of efficiency, preferably some figures that show that training is worth the costs.

- Therefore, course evaluation is usually done and is considered very important nowadays.

- In practice, however, evaluation in many cases mean nothing but a questionnaire where trainees indicate how pleased they are with the course (the well-known 'smile sheet'). Their answers are tabulated and presented in a nice report. Everybody is happy and the report filed away, the bureaucratic requirement for evaluation has been fulfilled.

- Any deeper evaluation on the actual results of the course is seldom done.

- It is both costly, and difficult, to measure the long-term effects of a training programme; this is why it is seldom done properly.

3) Bring up again the value of the questionnaire mentioned above. Ask participants for their opinions.

Is it really meaningful to find out about trainees' satisfaction and how they react to the programme? What difference does it make? Is it not the actual result of the course we should measure instead?. Elicit the following:

- If trainees like the sessions they are more likely to benefit from them. Therefore, it is useful to find out their reactions through discussions, ob-

servations or questionnaires.

- There is necessarily no direct and positive corre-
    lation between high satisfaction and high learn-
    ing.

- Trainees' reactions to a particular session should
    be checked <u>immediately</u> after the session. (Refer
    to the rating scales used during the course - See
    Session 1.2 Sheet 7.)

4)   Distribute the 'Course Review Form' (Sheet 4). Explain
      that this is an example of an 'end-of-course question-
      naire' designed to obtain trainees' opinions on the
      content and balance of a not too long course.

      Ask participants to fill in the form relating to the
      present course which will end soon. To facilitate
      their review, participants may need the course time-
      table as a reference in addition to the notes they
      have taken during previous sessions.

5)   When participants have filled in the forms, repeat the
      statement. that an evaluation of trainees' reactions
      does not tell the whole truth about a course. Ask par
      ticipants what other types of evaluations we could do
      immediately after a course:

- we can measure, through tests and examinations,
    what <u>knowledge</u> the trainees have.

      Explain the problems in this context; emphasise that a
      test would not tell us how much trainees have learned
      during the course unless one knows exactly what know-
      ledge they had before the course. Remind participants
      that tests are sometimes arranged at the beginning of
      a course in order to make a course evaluation poss-
      ible. Such 'diagnostic tests' also help trainers to
      adjust their sessions to the needs of trainees (Ref.
      Session 2.2).

      Tell participants that we will deal with test construc-

tion in the following session.

6)   Point out that we have now discussed evaluation on two
      different 'levels': the <u>reaction</u> level and the <u>learn-
      ing</u> level. Ask what the next logical step would be:
      evaluation of the practical effects of the course,
      i.e. how the trainee will change his <u>behaviour</u> after
      the training, and the <u>results</u> of these changes. Stress
      again that an evaluation on all four levels would be
      useful, but difficult. Discuss the problems and what a
      trainer, or training manager, can possibly do to carry
      through an evaluation of the two highest levels:

      -   A common problem is the 'transfer' of new know-
          ledge to the job. A trainee may never get the op-
          portunity to apply any new knowledge on his job be
          cause he is restricted to use the procedures and
          systems prescribed by his superiors. Only a close
          collaboration between the training centre and the
          co-operatives can overcome this problem. Trainers
          should pay visits to the co-operatives both before
          and some months after a course, interview managers
          and trainees and discuss training plans and train-
          ing results.

      -   By keeping in touch with trainees after the course
          a trainer may be able to collect valuable informa-
          tion. When 'new' managers have a perspective on
          the course and some experience on the job they are
          often able to provide useful hints on how to im-
          prove the programme. Letters, questionnaires and/
          or personal visits should be used.

      -   To evaluate the results of training in terms of re-
          duced costs, higher profits, etc., is extremely dif-
          ficult. Certain skill-training programmes can be
          evaluated (e.g. a course on operating a specific
          machine) and the gains calculated (e.g. the time
          saved, higher output, etc.) but for a general man-
          agement training programme it is an almost imposs-
          ible task.

7)   To sum up, ask one participant to give examples of
     evaluation on the four different levels.

8)   <u>Supplementary exercise</u>:

     One of the participants may have prepared, as a lec-
     ture assignment (Ref. Session 3.9), a short presenta-
     tion of the 'action commitment method' this presenta-
     tions should be done now.

     An 'action commitment' is a combination of an applica-
     tion project implemented by a trainee in his own job
     when he returns after a training programme and an
     evaluation of a the actual training programme. The
     method is used in most MATCOM training programmes and
     described at the end of the manuals.

COURSE REVIEW

COURSE CONTENTS AND BALANCE

Assume that the length of the course remained unchanged.
This means that if you wish to suggest other topics, some
of the current ones would have to be eliminated or drasti-
cally condensed

1. **Name the 5 sessions you regard as MOST valuable
    (appraise the subject area – not the speaker or method
    of presentation).**

    _____

    _____

    _____

    _____

2. **Name the 5 sessions you regard as LEAST valuable.**

    _____

    _____

    _____

    _____

    _____

3. **Suggest any topics, not presently included, which you
    would wish to have included in future courses.**

    _____

    _____

    _____

    _____

    _____

4.   Suggest any topics in the present course for which you
     think more time should be allowed for a fuller treat-
     ment. (Here include sessions noted under Point 1 above,
     if appropriate.)

     _____

     _____

     _____

5.   Does the general arrangement and development of subject
     matter appear logical?

     YES / NO   If NO, suggest improvements:

     _____

     _____

     _____

6.   Generally speaking, did you feel you had enough op-
     portunity for discussion?

     YES / NO   If NO, what do you suggest?

     a/ The lecture time should be reduced.   YES / NO

     b/ Notes for reading should be issued.   YES / NO

     c/ _____

7.   On balance, would you say that the course objective was
     achieved?

                                                     YES / NO

8.   Any further comments:

     _____

     _____

     _____

     _____

SESSION 6.2

TESTS

Objectives: To enable participants to construct and use
               simple classroom tests.
               (A review of the main issues of this course is
               also integrated in this session.)

Time: 2 1/2 - 3 hours.

Material: Participants' own notes from all previous
               sessions.
               Handout 'Instructions for group work'.
               List of training topics (on flip chart).

Session Guide:

1)   Warn participants that they will have to answer some
      test questions in this session. In contrast to other
      training programmes, however, they will also have to
      write the questions themselves.

      Also explain that this session has a dual purpose:
      while we learn how to prepare tests we will at the
      same time have the opportunity to review the issues
      covered in this course.

2)   Ask participants which type of tests they prefer to
      use, and why. Elicit and explain the following types:

      Objective tests.

      The trainees have to answer questions, either by sup-
      plying a short answer (one word) or by selecting the
      right answer from a set of given answers (multiple
      choice). Pros and cons:

      +   Can be graded objectively and quickly.

      +   High reliability.

- They are difficult to prepare for many of the common management training topics (e.g. problem solving).

Essay tests.

Trainees have to freely compose answers to questions. Some questions may be answered with a few words (e.g. 'What is the purpose of a provident fund?'), while others require a longer answer (e.g. 'Describe the procedure for staff recruitment'). Pros and cons:

+ Easy to construct.

+ Suitable to measure understanding, attitudes, creativity, organisational ability, etc.

- Difficult to grade.(Grading criteria and an 'answer key' should be prepared when the questions are written.)

- Unreliable because of subjective grading.

Performance Tests

Participants may also correctly suggest that simulation training methods such as in-basket exercises, role plays and business games could as well be used as performance tests.

3) Go through the basic rules for construction of multiple-choice tests, as outlined below.

- Use a direct question or an incomplete statement, as in these examples:

Which of the following is a participatory training method?

A   The lecture method.

B   The role play.

C   The film show.

Role plays are most suitable for training of:

A   bookkeepers.

B   typists.

C   salesmen.

- Use simple language which all trainees can under-
  stand.

- All choices should be as brief as possible. The
  correct choice should not be longer or shorter
  than the other options.

- All choices should be plausible but only one cor-
  rect.

- Avoid negative statements.

- Avoid the words 'always', 'never', 'all of the
  above' and 'none of the above'.

4)   Divide participants into groups of four members. Dis-
     tribute and go through the group work instructions.

5)   After the group work, during a short break, select the
     three or four best essay questions from each group so
     that you   get a suitable number for the following exer
     cise (maximum 16). order them logically according to
     topics.

     Also select some multiple-choice questions from each
     group on the same basis. If possible, transfer these
     questions to ohp transparencies, or mount them to-
     gether   on   larger   paper   sheets   and   arrange   for
     immediate copying.

6)   Ask participants to write down the selected essay ques-
     tions as you read them out from the papers.

7)   Ask participants to read through the questions again
     and count how many of them they believe they can
     answer correctly. After a while ask for one volunteer
     to try to answer all the questions. Let him answer

orally with the rest of the class as umpires, calling out his score after each answer and correcting him as necessary.

8) Give the volunteer due credit for his test result and explain that the <u>test constructors</u> will now be assessed.

Ask participants to identify those questions in the list which are not altogether perfect for use in this test and to state the reasons. If necessary, select and also read from the questions not used to find examples of unsuitable essay-questions. Participants should identify questions which do not fulfil the following requirements:

-   The question should be clear, precise, unambiguous and easily understood.

-   Essay questions should not normally be used for recall of simple memorised facts (objective tests are better for that), but should require the trainee to display his insights and mental abilities.

-   All questions should be related to important objectives and content.

9) Ask participants to select the best questions on the list. Identify the groups who submitted these questions and declare them winners of this 'test-writing test'.

10) Ask participants which other aspects must be considered by the constructor of an essay-test in addition to those mentioned under Point 8 above. Elicit the following:

-   The questions should vary in their levels of difficulty.

-   Clear instructions should be given in the begin-

ning of the test paper, including time allowed, the value of each question (number of points for a correct answer), etc.

11)   Explain the 'point-score method' for marking essay-tests:

   -    Grade the same question in all the papers in succession. (e.g. If there are 20 trainees in the class, mark question number one for all trainees before marking the next question.)

   -    Assign the appropriate number of points to each answer in accordance with the model answer you have prepared earlier. Compare the answers of dif ferent trainees to ensure a fair marking, adjust as necessary.

   -    Mark the papers without looking at trainees' names. Preferably, trainees should not write their names, but some other identification mark, on their papers.

12)   Point out that marking of objective tests are much easier if they are properly constructed. Demonstrate this through the multiple-choice items produced by the groups.

   Depending on your facilities, hand out copies of the items you have selected or show them on the ohp. A less effective alternative is to let each participant 'draw a card' from the pack of items and present it to the rest of the class.

   The selected items should be dealt with one by one; first answered, and then commented upon from a test-construction point of view. The aspects listed under Point 3 above should be considered.

13)   When all items have been analysed let participants select the best items and appoint a winning group also

in this 'test-writing test'.

14) Remind participants that the purpose of a test is to measure if trainees have achieved the training objectives. For this reason it is necessary to plan the test carefully so that the questions cover all the important parts of the course and are related to the course objective.

15) Present a table as on the flip chart showing the content of this course grouped in ten logical units/ topics like this:

- Training needs analysis
- Preparing objectives
- Learning principles
- The lecture method
- Discussion leading
- Visual aids.
- Participatory methods
- Choice of methods
- Test construction
- Evaluation technique

Suggest that a final test for this course should consist of 30 questions of equal value. On average there would be three questions on each topic, but ask participants to distribute the questions as they think appropriate with regard to the importance of the different topics. They may, for instance, have five questions for some topics and only one for others. Allow approximately five minutes for participants to individually make their plans.

16) Ask one of the participants to come to the flip chart and fill in his suggestions. Ask if someone has a very

different opinion and ask him to fill in his figures as well.

Let these two participants sit in front and have a 'panel debate' on the question of 'What skills and knowledge does a co-operative trainer need?' Allow a maximum of ten minutes for their discussion, without interfering, then invite other participants to also present their views.

Ask another participant to sum up the discussion. (Take note of the aspects on the course content presented in the discussion - they may be useful for the evaluation of this particular course.)

17) Ask participants if they would actually like to be tested now, seriously, in the same way as in a secondary school, and what purposes such a test and examination would serve. Also discuss how young and adult learners look upon tests. Elicit the following points:

   -   The young student may look upon the final examination itself as his goal because it will give him the 'chance to apply for a certain job (There is a risk that examinations become more important than learning and understanding to the young students).

   -   Adult trainees may attend a course just because they want to pass a test and have one more certificates. Most of the adult trainees, however, have already qualified for their jobs and they enrol in a course to pick up more useful knowledge - not to be tested.

   -   A test of adult learners, therefore, may not be necessary at all for 'qualification' purposes. Of course tests may still be used to give trainees a feedback on their progress, and confirm to the trainer whether his training methods have been effective or not. In such cases it is important that the participants fully understand the reasons - and agree.

Instructions for Group Work.

Assume that you are going to prepare a final test for participants of this course. Each group should prepare eight essay questions and as many multiple-choice items as time permits.

Your questions may refer to any of the topics dealt with during the course. A selection of questions (in order to have proper coverage of all topics) will be done later.

For reference, have available a timetable for the course or a list of sessions and all the notes you have taken during the course.

Write each question on a separate slip of paper. Write clearly so that your papers can be photo-copied.

Also mark your group number on the paper.

The' essay-quest ions should have the correct answer on the reverse side, or a short list of the key points which should be covered by a correct answer.

The 'longest' essay-questions should not take more than three minutes to answer in writing.

The multiple-choice questions should have four options.

Be very careful and formulate high-quality questions which can be used to measure whether participants have achieved the objectives of this course.

You have one hour for the group work.

SESSION 6.3

EVALUATION AND CLOSING

Objective: To collect further views from participants
                with regard to this course and to close the
                course.

Time: 1 hour.

Material: Set of Cards (See Point 3).

Session Guide:

1)   Point out that participants have already contributed
      to the evaluation of this course by filling in a form
      (Session 6.1) and discussing the importance of dif-
      ferent topics in teacher training (Session 6.2).

      Explain that you want participants to now take part in
      a concluding discussion about the course.

2)   Write the points for discussion on the chalkboard.
      Depending on the number of participants choose three
      or four issues on which you want further views, al
      though some question could be included just for amuse-
      ment. Examples of matters to discuss:

      -    Workshop content.

      -    The methods used by the course leader.

      -    Course work load.

      -    Course facilities (for training, boarding,

           etc.).

      -    The social life of our group.

3)   Hand out one card to each participant. The cards
      should be prepared in advance, as follows:

If there are 18 participants and three issues to discuss there should be three cards marked A +, three marked A –, three B +, three B –, three C + and three C –.

Tell participants that those with the same marks on their cards form a group and explain that the letter on the card refers to the issue to discuss. Mark the issues on the chalkboard accordingly – with A, B and C. Explain that a plus on the card means that participants should list only positive aspects of the issue, a minus that they should list the negative aspects.

Ask the groups to go to separate corners or rooms and prepare their lists. Give them a maximum of ten minutes.

4) After the group work invite participants to a debate. Ask for the negative side of an issue first, then the positive and encourage discussion of the issue.

Take notes of all useful points for consideration in the final evaluation of the course.

5) To wind up the course explain to participants that the method used for this final debate is particularly useful when it is important to elicit negative as well as positive comments, e.g. in a course evaluation.

6) Conclude the course by stressing to the participants the need to develop good training habits by putting into practice the ideas and skills gained from the course. Explain any possibilities there might be for a follow-up course, or other opportunities available for participants to develop their training skills further.

If a special guest has been invited to officially close the course, he should then perform that function.