



PARTICIPATIVE TEACHING METHODS

A GUIDE WITH SPECIMEN EXERCISES FOR CO-OPERATIVE TEACHERS

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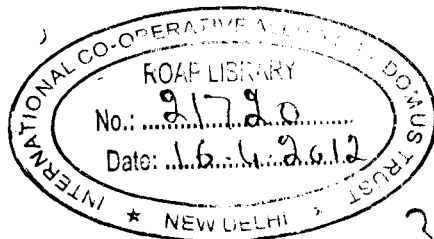
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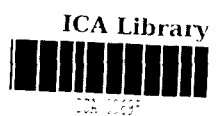
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CONTENTS

	<u>Page No.</u>
1	1
2	2
2.1	4
2.2	6
2.3	10
2.4	12
2.5	13
2.6	17
2.7	19
2.8	22
2.9	25
3	29
3.1	29
3.2	32
3.3	38
4	46
4.1	46
(1) Purpose of Staff Education	47
(2) The Ideal Committee Member	48
4.2	49
(1) Le Papillon Co-operative Transport Society	50
(2) The Agricultural Co-operative of Bambia	56
(3) Course Planning	62
(4) Dugdharam Dairy Co-operative Society	64
(5) A Visit to Snoralong	72
(6) Co-operative Cotton Marketing in Ictsanía	73
(7) Keyo Cane Production Society	77
(8) Popularising Artificial Insemination	78
4.3	79
(1) The Deputy Registrar at Meerut	80
(2) Tatra Consumer Co-operative Society	85
4.4	101
(1) Labumba Co-operative Rice Mills	102
(2) Movealong Multipurpose Co-operative Society	106
(3) NSO Credit Union - a Problem of Apathy	109
(4) Procedures at Meetings	111
4.5	117
(1) Relation between Co-operatives and Government	118

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PARTICIPATIVE TEACHING METHODS

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1. INTRODUCTION

There is a rapidly growing interest within Co-operative colleges and training institutions in the use of new and improved teaching methods. This guide has been designed to assist in that development, by offering advice drawn from Co-operative experience and related to Co-operative situations.

It is not intended as a manual on educational theory or teaching practice. It is a limited description of some techniques used in teaching, which are called participative teaching methods, because they seek to bring students into active participation in the teaching and learning process.

Teaching and Learning

The purpose of teaching is to promote learning. The role of the teacher is to help the student to understand and NOT merely to instruct and drill the student. A major function of the teacher is to organise and provide the setting within which learning can take place. The most significant elements of that setting are:

- (1) the relationship between members of the group (including the teacher);
- (2) their ability to communicate with one another;
- (3) the relevance of the topic to the interests and needs of the students;
- (4) the materials and techniques employed.

To encourage learning, therefore, we have to create situations which, by the interplay of these elements, activate and stimulate communication and understanding.

Simple communication of information or argument from one person to another is, of course, possible without the receiver or listener doing anything more than listening and trying to memorise and understand. In such situations, as in a lecture or listening to a radio broadcast, the listener plays a more or less passive role. The lecture technique undoubtedly has its place in teaching methods, particularly where it is necessary to convey facts or instruction in a disciplined and orderly way, as in the teaching of mathematics or accounting, or when the student cannot read the material for himself. But, even when used with much skill, the lecture is basically concerned simply to provide information in such a way that the student will understand it and, it is hoped, think about it.

2. PARTICIPATIVE TEACHING METHODS

It is helpful to remember that the tradition of using the lecture method in higher education began before printing was invented. When books became available, the second stage was reading by the student, followed by discussion with a tutor. Today, the best schools and universities increasingly use participative teaching methods.

Participative teaching is concerned to encourage students to discover things for themselves, and to learn by bringing their own experience, ideas and skills into active participation in the process of learning.

Teachers themselves readily recognise the value of this technique in teaching-training courses, where new ideas or approaches are tested against their own present experience and skill.

In Co-operative training and education, participative teaching methods are particularly relevant and useful for four reasons:

- (1) In the main, the students are mature adults;
- (2) Most of them bring to the training course a background of experience in Co-operative work;
- (3) They are usually people who are enthusiastic about Co-operatives;
- (4) The nature of Co-operative enterprise requires participation.

All these are qualities which the teacher will wish to use to full advantage in imparting new information or teaching new skills. The effective way to do that is to employ methods that seek to draw on the previous experience of students and, by relating that experience to new information, encourage the learning process.

Participative teaching methods help to cultivate:

- (1) Verbal skills (the ability to explain or advocate);
- (2) Mental skills (the ability to weigh and assess facts and understand relationships);
- (3) Social skills (the ability to work with other people);

all of which are of the greatest importance in Co-operative work.

It is necessary to realise that the use of these methods does not minimise the contribution required from the teacher. The distinctive feature of them is not that the teacher's efforts are replaced by those of the students, but that the teacher seeks to create situations, in which students learn from themselves and from each other, as well as from the teacher. Indeed, the use of such methods (and some people might consider this a disadvantage) makes greater demands on teaching skill and dedication than do more traditional methods, particularly in the preparatory work necessary.

Be Adventurous

In planning any training programme it is necessary to begin by defining the objectives of the programme, and then decide the most economical and effective method of achieving these objectives with the resources available. It is as bad to be diverted from a well thought out approach by enthusiasm for new techniques as to be persuaded that no change is necessary by a conservative attachment to old ones. However, until you have tried a technique, you do not know what its potential value is.

Of course, the first time you experiment with a new method almost always incurs more time and effort on the teacher's part than the immediate results appear to justify. This is particularly true as many students themselves resist being introduced to new methods. Nevertheless, experiments have to be made if your teaching is to remain lively and creative and become more effective. In the long run, a willingness to experiment and to persist with trying out new approaches, pays off.

Learning by doing is the particular feature of the Participative Teaching Technique. Remember the old saying:

What we hear we FORGET;

What we see we REMEMBER;

What we do we UNDERSTAND.

One last point: Several examples of materials used with participative teaching methods are included on the coloured pages at the end of this book. It should be strongly emphasised that these are examples only. It is hoped that they will serve as useful guides to teachers in preparing their own material, adjusted to the local conditions.

2.1 USE OF LESSON NOTES

Used correctly, duplicated lesson notes are a valuable support to participative teaching. They provide basic study and discussion material which can be developed in participative teaching sessions. If there is a hard core of material in writing, you lessen the possibility of participative teaching sessions drifting away from the point and losing their purpose.

More important, they save time, otherwise taken up by lectures, which can be used for other teaching exercises. If the students study lesson notes in their own time, the teacher has more class time available. Of course, many experienced teachers say that all students do not read written material. One answer to that is that they do not all listen to lectures either, and at least lesson notes, unlike lectures, can be looked at again for review purposes.

Most students will use lesson and discussion notes if they are well written, and if their purpose is explained.

What Should Go Into Lesson Notes

It is sometimes difficult to decide what should go into lesson notes. There are, perhaps, two measures to apply in deciding this:

- (1) Do not bother to reproduce material which is already available to students in text-books or other readily available sources. Providing potted versions of passages from text-books is not teaching. The notes should be a summary or outline of the teacher's own comments on the topic, emphasising the particular points he wishes to make, and raising the questions to which he wishes to direct the students' attention. It is a good idea to raise these questions for answer and discussion at later sessions.
- (2) Look carefully and critically at the material you normally communicate through lectures and ask yourself these questions: Why is it necessary to present it verbally? How much of it could be better communicated in written form?

Lesson notes in outline form should allow space for the student to add his own notes.

When to Give Out Notes

This depends on the use to be made of the lesson notes. For example, if the subject is (a) complicated, or (b) technical, or (c) includes definitions to be learned, or (d) many references, the teacher may give out the notes at the beginning of the class, so students can follow the presentation more easily, without having to write so many notes of their own.

Some teachers prefer to give out class notes for review only at the end of the class session, because (a) the student pays better attention, and (b) notes down items of particular value to his own situation, and (c) usually remembers more.

If the notes are used in a discussion in class, again, ask yourself what use they have:

- (1) Do the students have to read serious material, and think about it to discuss it intelligently? Then give notes out ahead of time for advance reading.
- (2) If the discussion notes call for an on-the-spot reaction of the students, give them out at the beginning of the discussion session.

Generally, it is advisable to give students notes relating to a particular session either at the session or if they are to be used for discussion purposes at the session, only a short time before. This encourages them to read the notes at the time the content fits into the programme. Never give out lesson notes for the entire course at the beginning of the course.

Of course, lesson notes can be badly or incorrectly used, and often are. Students will often rely upon them more than they should. At worst, some people will simply file them away until close to examination time, when they make a desperate effort to memorise the contents to be repeated parrot-fashion in answer to the tests set.

Many teachers profess to dislike lesson notes for these reasons. It should be remembered, however, that the efficiency of any teaching method is determined by the teacher, not by the students. If notes are not being used correctly, it may be the teacher who is at fault. For example, if the students can pass the examination merely by repeating memorised material, it is usually not a good examination.

2.2 GROUP DISCUSSION TECHNIQUES

A variety of participative techniques will be described in this manual. Most of them involve group discussion in some form.

The following methods will be described:

Informal Discussion in Class,
Case Studies,
In-Tray Exercises,
Role Plays, or Socio-Dramas,
Ranking Exercises,
Debating, and
Business Games.

Before describing each, we will make some comments that apply to participative techniques in general.

The way people think and act in groups often differs from the way they think and behave individually. Group dynamics is the name given to this fact. You may wish to read more on this subject.

Advantages

It is important to be clear about the advantages of this process. We can list these as follows:

- (1) It helps to avoid monotony and boredom, and so to stimulate interest.
- (2) It encourages people to talk and to express their opinions. Often this brings hidden conflicts within the group out into the open. Skilled teachers can use this productively and helpfully.
- (3) Participants tend to remember things that they have had to defend or explain to others.
- (4) Group discussion is a co-operative exercise through which the group seeks solutions to problems. It thus uses the experience and wisdom of group members. Note that only those teachers who genuinely respect the opinions of their students can use group discussion for this purpose.
- (5) From the teacher's point of view, it is easier to correct a few group solutions than many individual ones.
- (6) Finally, and perhaps most important, group discussion can influence attitudes and beliefs, and so open the way to the use of newly acquired skills or information.

Attitude Changes

It is worth discussing this last, but most significant, advantage further, to consider how this process of attitude change works.

There are many ways of causing people to learn facts and to understand concepts. The trouble is that they will not generally act on what they have learnt if it conflicts with deeply held attitudes, habits or prejudices. Most of us are usually willing to learn facts from anyone we think to be knowledgeable, but we are much less willing to unlearn old habits or to change attitudes. Subconsciously at least, most people are reluctant to change their attitudes, especially if this will put them out of step with friends or workmates. The possible risk involved becomes more acceptable if we hear others discussing the advantages of change. Indeed, in a group situation, fear can work the other way. A person may not wish to find himself alone in defence of an attitude abandoned by others.

The importance of this in Co-operative education and training will be readily seen. If the objective of a training course is to teach certain procedures, in the anticipation that these will be put into practice when the student returns to his Co-operative, then it is essential for the student not only to understand how they operate, but also to accept that they are preferable to those he used previously. The saying "old habits die hard" is very true. If an "old habit" is a "bad habit", it has to be unlearnt before it can be replaced by a "good habit".

Some Basic Rules

To secure this process of attitude change, or unlearning, through group discussion techniques, it is necessary to follow some basic rules. If these are ignored, such techniques can easily reinforce existing unwanted prejudices or even introduce new ones. These rules might be summarised as follows:

- (1) First the teacher has to foster in the group an element of doubt about the attitudes he wishes to change. He does this by questioning the assumptions on which they are based and suggesting alternatives. (It is even better to get the students to question the assumptions, and suggest alternatives).
- (2) Next he has to make the participants feel safe enough to voice to each other the doubts they may suspect or feel. If they have this feeling of security, some will not mind expressing their ideas before they are sure they are correct and acceptable to the rest of the group.
- (3) Once this process begins, other members will be encouraged to try out their ideas, and a free interchange of opinion based on experience can take place.
- (4) The results of this group effort is then subjected to assessment and evaluation by the teacher.

Summary

Thus:

- (1) beginning with an element of doubt,
- (2) supported by a feeling of security,
- (3) encouraged by the relationship within the group, and
- (4) guided by the teacher;

the group members help to encourage and push each other through the process of change and learning.

As noted earlier, it is not argued that group discussion techniques are appropriate to the teaching of all subjects, or to all the teaching requirements in any one subject, but they do have a very wide and significant relevance to any learning process involving adult students.

Exercise

1. Test your recall of what we have discussed in this section by completing the following summary statement from the text:

"Thus, beginning with an element of _____, supported by a feeling of _____, _____ by the relationship within the group and _____ by the teacher, the group members help to encourage and push each other through the process of _____ and learning".

Check your answers by reference to the preceding pages.

2. Think over the following questions. No answers are offered to them, but you will find it useful to measure your own response to what we have discussed in this section by reference to them. If you could discuss them with your colleagues, it would be especially useful.
- (a) How would you foster healthy doubt at the beginning of a group discussion?
 - (b) What is an "assumption"?
 - (c) Tell one way you could build a feeling of security in a group.
 - (d) What could you do to help people develop relationships in a group?
 - (e) Give an example of how a teacher can guide a group in discussion without dominating.
 - (f) In addition to learning, what else do you want to result from discussion?
 - (g) What group discussion techniques would be useful in teaching of your own subjects? If you could not use discussion in your classes, say why not.
 - (h) Apart from the advantages of group discussion which we have listed, can you think of others?
 - (i) In terms of your understanding about the need for sense of security on the part of students, should a teacher always be present during group discussion?
 - (j) Many teachers are sceptical about the value of group discussion techniques. Is it likely that this is because they are afraid of new ideas, and reluctant to change?

2.3 INFORMAL GROUP DISCUSSION

Most teachers will be familiar with the techniques of organising group discussions but it would be useful to summarise them here under two main headings: arrangements, and the role of the teacher.

Arrangements

- (1) Seat the group informally preferably around tables, in such a way that each person can see every other.
- (2) Work to a known time schedule – start and finish at times set.
- (3) Have a blackboard available and encourage its use.
- (4) If the group is large, divide into smaller groups for discussion. For most purposes, it is appropriate to have 5 – 7 participants in each group. Ideally, each group needs a separate room, but several groups can operate successfully in the same room at the same time if the room is big enough.
- (5) Make sure participants know one another, by name. You may want participants to wear labels with their names on, or you may put name labels where they sit.

Role of the Teacher

- (1) Emphasise that all members of the group are to take part, but there should be no long speeches.
- (2) Prepare yourself. Think through questions in advance. Distribute any prepared discussion or background material well in advance.
- (3) Try to put well-defined questions or issues before the group.
- (4) Get the group to choose a chairman for the discussion.
The chairman should:
 - (a) Keep the discussion to the point, but not make speeches, or force the discussion in a direction he favours;
 - (b) Ensure that all members participate, by drawing out comments from quiet members, and tactfully interrupting people inclined to make speeches.
- (5) Ask the group also to choose a secretary, who will write down and report the main ideas, conclusions, or suggestions of the group, and report them orally at the end of the discussion. This helps the group see what has been accomplished. Also, if there are misunderstandings, or disagreements on what has been said or agreed on, the report by the secretary gives the group an opportunity to clarify its thinking.
- (6) At the end the teacher should:
 - (1) Summarise the discussion;
 - (2) Identify points of agreement and conclusion;
 - (3) Point out issues that will require further study; and
 - (4) If it is appropriate, add his own views and comments.

Exercise

Think over the following questions. No answers are offered to them, but you will find it useful to measure your own response to what we have discussed in this section by reference to them. If you could discuss them with your colleagues, it would be especially useful.

1. Why is it good for the group to choose a chairman, instead of the teacher?
2. List some possible benefits of having a separate secretary to report the main points of discussion.
3. It is recommended that people in a class rotate in the position of chairman and secretary for informal discussions. Why?
4. Why is it recommended that large groups be divided into smaller ones for discussions?

2.4 RANKING EXERCISES

This is a simple, but effective, participative teaching exercise. Students, working either in groups or individually, are given a list of items and asked to "rank" these in order of priority. They write (1) against the item considered most important, (2) against the next in degree of importance, and so on through the list.

For example, students might be given a list of desirable qualities in Co-operative secretaries, or in Co-operative committee members. When the first part of the exercise has been completed, the "rankings" are compared and participants asked to explain why they made the choices they did.

The fact that this exercise is so easy to handle makes it useful as a first experience of participative teaching methods for both teachers and students. However, it can be used to make quite sophisticated points, and to provide the basis of lively discussion. For instance, what groups consisting of committee members expect from officials can be compared with what groups of officials expect from themselves.

Two specimen ranking exercises are included for your guidance (See orange pages 46 - 48.)

2.5 CASE STUDIES

A case study is a problem-solving exercise in which students are given a written description of a particular incident, situation or series of events. If necessary, the written notes can be supplemented by spoken words, tape-recordings, pictures, statistics or visits.

The users are usually asked to work out answers to problems identified in the case study on the basis of information provided to them. This may require judgement, or precise calculation, or both. There may be indisputably "right" answers, but in many cases, there may well be debate or difference of opinion as to the "best" solution. In submitting their "answers," the users should be required to support their conclusions with evidence drawn from the facts presented to them.

Case studies are normally used as group discussion exercises. However, (a) a lecturer may sometimes use a case to illustrate a lesson, and himself expound the moral. Alternatively, (b) individuals may be set cases to work out on their own, perhaps with the intention of comparing and discussing the solutions arrived at.

The case study may be either a true or fictional account of a situation depending on the purposes of the exercise. Usually a teacher will prefer to use a fictional study based on actual situations, in order to offer a complete description including all the elements he wants to present.

On the other hand, it should be pointed out that the more a teacher can use actual facts for a case, the stronger will his position be when it comes to a discussion with his students about the case and the suggested "answers"

Subject Areas for Case Studies

These are some of the subjects for which case studies have often been found useful:

- (1) accounting and auditing;
- (2) business management;
- (3) personnel and human relations;
- (4) management committee policy making;
- (5) education, and employee training; and
- (6) public relations.

Advantages

(1) The case study method encourages students to relate theory to practice. It is not a substitute for actual working experience, nor intended to be. But it can be so written as to highlight problems which are obscured in real life, or which do not occur in a sequence, at times or places convenient for teaching.

(2) The indirect approach of the fictional case study helps to avoid obstacles in the direct use of real events. For example, if you criticize people's performance on a job, there is a tendency for them to defend themselves, and to reject your criticism. It is more fruitful to mirror aspects of their behaviour in a fictional study, and ask them to question them in that setting.

(3) In the exchange of argument and opinion that the case study should provoke, participants will be encouraged to examine alternative ideas and methods and perhaps to shift from fixed positions. Many people who pride themselves on their experience or knowledge are reluctant to accept theoretical explanations. The use of case studies enables them to test the experience and knowledge they have, and in the process, they may well identify gaps in their existing knowledge for themselves, and so become more teachable.

Limitations

(1) Case study exercises can take up a lot of time. When compared with lectures, they seem inefficient in terms of the amount of information which can be presented to students. On the other hand, the real test of efficiency is how much information has been absorbed and understood.

(2) Case studies may also require participants to use time absorbing a lot of background information not otherwise useful. This will be particularly likely if the participants do not share a common body of experience.

(3) Case studies are usually not suitable for beginners. They work best if students are able to use their own experience and knowledge in consideration of the study. However, beginners can learn to analyse situations by making up simple case studies themselves. This is good training for future teachers.

(4) Lessons learnt from case study activity are not easily tested in traditional essay-type examinations. In courses dominated by the need to pass traditional examinations, neither students nor teachers readily accept the case study techniques. This may, of course, be a criticism of the course, or the examination, rather than of the technique.

(5) There is sometimes a tendency for groups to see the exercise as a game and to refuse to take it seriously.

Making Case Studies

As we have already said case studies may be true or fictional accounts based on actual situations. Many teachers prefer the latter but in either case it is, of course, important to ensure that the study is relevant to your objectives.

It is good practice to write down the particular objectives of the case study and to check that the result is likely to achieve them. Be sure that students are given the information they require to produce answers to questions you set.

Source material is frequently difficult to find and it is a good idea to keep a box file of reports, clippings, etc. which you think might be useful for this purpose. Collect copies of the reports of Co-operatives to provide statistical and other examples. Remember to keep the case study realistic. For example, the expenditure items in the balance sheet of a consumer co-operative would not be relevant in a study depicting a situation in a marketing co-operative.

Describe events and facts as briefly as possible, but make the study comprehensive. Do not make it too long. If you use more than 500 words, check that there are good reasons for its length.

If you are describing an actual situation, decide whether it would be useful to disguise this fact by changing names and other identifiable features.

Make clear your instructions and expectations by including specific tasks or questions for completion.

Specimen Case Studies

Some specimen case studies are included for your guidance. (See yellow pages 49 - 78) It is not intended you should use these as they stand. They are offered as models to provide ideas for writing your own. It is a useful idea to suggest that a "bank" of case studies be kept at your college or office. Into this can go copies of all studies used by you and your colleagues, and also copies you might obtain from other places. These can then be used to provide ideas for any teacher looking for inspiration.

Using Case Studies

A common pattern is to give a lecture or lesson first, and then to divide students into groups to consider a case study related to the contents of the lecture.

After discussing the case study, each group makes a summary of its findings and the group then reports back on their conclusions to a meeting of the full class.

Alternatively, you can begin with a case study and follow this by a lesson reinforcing the points brought out in the discussions on the study. Putting the case study first can enter the element of doubt about the validity of present knowledge which we spoke of earlier, and so make people more receptive to new ideas.

For complicated cases, it is particularly important that the groups be small and that you allow enough time for the problems to be worked out. You may need to allow a day or more for cases involving calculations and business analysis at an advanced level.

Exercise

Test your comprehension of what you have read by completing the following exercise:

1. One advantage of case studies is that they encourage students to relate _____ to _____.
2. Can you complete this extract from the text?
"If you criticize people's _____ on a job, there is a tendency for them to _____ themselves, and to reject your _____."
3. List five limitations of case studies.
4. Can you complete this extract from the text?
"Make clear your instructions and expectations by including specific _____ or _____ for completion."

Check your answers by reference to the text.

2.6 IN-TRAY EXERCISES

An In-Tray Exercise is a form of case study done from office papers.

How the Exercise Works

For this exercise a description of a situation is given to each student. This gives them the necessary background information they will need to help them decide their answers to the problems set. For example, they might be told they are a Manager of a Marketing Union. They have come into the office one morning with one hour for desk work before going on a journey. They are given background details about the Union and about selected employees, including the one whose part they have to play. Participants must absorb these background details before the exercise begins. Distribute them well in advance and give ample opportunity for questions and explanations.

Each student is then given a collection of letters and other documents. These represent papers which in normal circumstances a Union Manager might expect to find in his in-tray awaiting his attention. The students have to decide what action they would take in respect of each, or as many as they can cope with in the time available. In some cases, they will draft replies; in others, write notes to colleagues instructing them on action to be taken; in some cases they will take immediate action, and indicate what they would have done by writing down their decision.

It is a good idea to include more papers than can be properly dealt with in the time available, so requiring students to sort the papers in some order of priority before they begin.

When this part of the exercise has been completed, the responses and answers of the various students can be compared and discussed, with the teacher commenting on the action taken and, where necessary, indicating faults or weaknesses in judgement.

Advantages

- (1) This is a technique which is simple to use.
- (2) It arouses great interest on the part of the students.
- (3) This exercise can help greatly to develop a sense of judgement on the basis of information available.
- (4) It gives practice in decision making.
- (5) It helps to indicate the problems involved in dealing with a variety of management questions.

How to Prepare In-Tray Exercises

- (1) Read some of the business papers your students have to deal with in their working life.
- (2) Choose the problems on which you want to give your students practice in the exercise.

- (3) Write out the background information. Either make the geography of the area very simple indeed or include a map. Either include very few characters or include an organisation chart.
- (4) Write out the letters or other documents for the In-Tray. You will not know how many to use until you have experimented with the types of people you teach. About 15 letters per hour will make a useful first trial.
- (5) Make notes on the type of action you would expect good students to take on each paper in the In-Tray. With some groups it will be useful to distribute these notes as a basis for discussion after the students have completed the exercise.

Some Suggestions for In-Tray Items

- (1) Put an important item near the end so that students learn to look through all their papers at the start to pick out urgent ones.
- (2) Put in connected items. For example, one item might cause a careless student to send his vehicle for service, although another item has caused him to arrange an important journey on the same day.
- (3) Have papers for signature which contain errors. For instance, there may be important typing errors or columns of figures which have been added up incorrectly.
- (4) One item may ask that a speech or an article for a newspaper be drafted. In your assessment at the end, you will probably be critical of participants who spend all their time on this and therefore cannot handle the other important papers.
- (5) Test the courtesy of the participants. Cause them to have to refuse an application for a loan or for leave. Criticize those who just scrawl a curt rejection on the application.
- (6) Put in items which ought to be delegated.

Exercise

Six suggestions for In-Tray exercise items were made. Write down as many of them as you can recall and then refer back to check and, if necessary complete your list. Add some suggestions of your own.

Specimen In-Tray Exercises

Some specimen in-tray exercises are included for your guidance (see pages 79 - 100). Use them as models when you prepare your own, and try to keep a "bank" of them at your school or office.

2.7 ROLE PLAYING

In a case study exercise, students are asked to say what they would do or recommend on the basis of the information provided. In a role play exercise they are asked to imagine that they are actually participating in a real life situation, and to work out their responses to the situation as it develops.

Role playing can be fun, but is not a game. It is a serious and useful training technique which, if well conducted, has great learning potential, for teaching empathy, or the ability to sympathize with and understand the emotions of another person.

As in the use of case studies, the situations depicted in role play exercises should be closely related to the working experience and needs of the participants. The students should be able to readily perceive the relevance of the exercise to their own circumstances.

Advantages

- (1) Role playing is a valuable training method because it develops the capacity to analyse information, to make judgements, to describe and explain, to argue and to persuade.
- (2) Since the effects of making mistakes are not the same as in real life, the participants can feel sufficiently secure to experiment and to try out new ideas.
- (3) By playing roles opposite to those played in real life, people have the opportunity of experience of the other side of the issue being discussed. For instance, those whose working responsibilities include interviewing other people can play the part of a person being interviewed, a manager can play the part of a discontented employee or of a trade union leader, or a salesman can play the part of a difficult customer. In the process, the participants gain insight into the other man's point of view and the attitudes that shape it. For supervisors and managers in particular, this is an extremely important attribute.

Limitations

- (1) Role plays require considerable class time, and space for acting out the situation.
- (2) Inexperienced teachers often cannot keep the students in the serious mood required.
- (3) The value of the exercise is lost if the teacher does not know enough about the dynamics of human behaviour to help the students draw out the lessons from the experiences.
- (4) Feelings can be hurt by inept management of role plays.

When to Use a Role Play

Use a role play when you need to teach the human relations aspect of co-operative operation.

For example:

- (1) Relations between the managing committee or board of directors and the co-operative manager;
- (2) Personnel relations;
- (3) Member relations;
- (4) Public relations;
- (5) Relations between salesmen and customers.

When Not to Use a Role Play

Do not use a role play to teach a process in which the emphasis is on:

- (1) Technical skill;
- (2) Order of step-by-step procedure;
- (3) Presenting factual material; or
- (4) Doing computations.

Note that Role Play is primarily designed to teach those who act in it. It is quite different from using a play as a demonstration in which the actors show something they already know to the audience.

How a Role Play Operates

- (1) The number of players in a role play exercise should be limited to about five, as above this number it becomes difficult to keep the discussion focussed on the points of main interest.
- (2) Each person taking part in the role play receives a description of a situation, with additional information about the character he is to play. This additional information is not made available to the other people taking part in the exercise.
- (3) Using the information provided, the participants then proceed to act out the part, as they believe the person would in real life. They try hard to portray the emotions of that person, even if they are not attractive or likeable. The details of the action and, in particular, the dialogue are made up by the actors as they go along, in response to the situation that develops. No costumes or scenery are used.
- (4) The teacher stops the action before the problem situation is resolved, as soon as the factors that created the problem and the emotional factors are revealed. (This is done to focus attention on the learning experience, rather than on the "plot").
- (5) Students not participating in the exercise act as observers. They are expected to offer an analysis of what they saw in the drama, and of the human problems and motivations involved.
- (6) The situation can be re-played, reversing the roles, with the observers taking the parts and the first players as observers.
- (7) Group discussion follows on what was learned from the exercise.

Preparation

- (1) It is necessary to prepare well-thought-out descriptions of the general situation, and the particular role each participant is to play. Specimen Role Play No. 1. "Labumba Co-operative Rice Mill" (pages 102 to 105) is an example of how this might be done. There are four players: the president, the manager, the supervisor, and an employee.
- (2) Each player is given a copy of the "description of the situation".
- (3) Each is also given a copy of the paper describing his own personality and role, but is not given details of the other characters. This arrangement makes for spontaneity, and calls for the exercise of imagination and quick thinking on the part of all players.
- (4) Players should not be rehearsed in their roles, but teachers should ensure that each fully understands what is expected of him.
- (5) It is useful to "brief" players separately, and to emphasize particular points which the teacher wishes to bring out.
- (6) Make sure you do not assign a person to a role which involves humiliating him by showing that he is incompetent at the job he does in real life. Be very cautious about giving anyone a role or a personality type which is very close to his own real one. It would usually be safe to let a good salesman play the role of a salesman so that he can practice the relevant skill. It would be very dangerous to let a domineering or insecure Manager play the role of a domineering or insecure Manager, especially if any of his real subordinates are present.

Before undertaking a role play for the first time, the teacher should read about them.

Exercise

Test your recall of the section on Role Play by completing the following sentences:

- (a) Role play can teach empathy which is the ability to _____ with and _____ understand the emotions of another person.
- (b) Role play is primarily designed to teach those who _____ in it. It is quite different from using a play as a demonstration in which actors show something they already _____ to the audience.
- (c) Make sure you do not assign a person to a role which involves _____ him by showing that he is _____ in the job he does in real life.
- (d) In a role play the details of the action and, in particular, the _____ are made up by the _____ as they go along.

Specimen Role Playing Exercises

Some specimen role playing exercises are included for your guidance (see blue pages 101 - 116) Use them as models like the other specimen exercises.

2.8 DEBATING

Used as a training and educational technique, a debate is essentially an argument in which there are two sides represented. One side argues for a case and the other side seeks to refute it and to put up alternatives. There can be one or more speakers on each side and members of the audience can be invited to contribute their own views in support of one side or the other.

Generally it is a good idea to have three or four speakers on each side and for the remainder of the students to act as judges or evaluators. The time allocated for each speaker should be strictly limited and no speaker should be permitted to exceed the time allowed.

The students listening to the debate can be given a form on which they are asked to evaluate the performance of each speaker. They should be advised that in making their assessments, they should disregard their own views on the subject, and try to make their decisions on the basis of balance of the arguments put forward and the debating skill of the speakers.

A chairman or moderator is appointed to control the proceedings.

Advantages

- (1) Debates can be effectively employed for teaching purposes. They serve to exercise students in:
 - (a) Researching, organising and presenting the facts of a case;
 - (b) In considering the arguments of others, and
 - (c) In speech making.
- (2) In the process there will also be an exchange of information on the subject under discussion. Perhaps the most valuable feature is that participants are helped to realize that there can be several different, but equally valid, views on a particular subject, and on action which might be taken on the basis of information available.
- (3) Debate is at the very heart of the democratic process since it is by this means that we arrive at decisions and conclusions. Since a Co-operative is a democratically controlled organisation, experience in the technique of debating is a valuable educational exercise for Co-operators.

Limitations

- (1) Debates take time, on the part of the students, to prepare.
- (2) Factual evidence may not be available for students' use.
- (3) Students have difficulty judging performance of fellow students objectively.
- (4) Students are reluctant to take unpopular stands on questions.

How the Debate is Conducted

The issue debated is stated in the form of a proposition resolution. The proposition to be debated must be a clear statement of a position, opinion, or decision on an issue. It must include only one idea, or subject. It must be controversial – that is, there must be a real difference of opinion on the subject.

The proposition can be (1) a statement of fact – that a certain thing is true; (2) a statement of a policy that is recommended; or (3) a statement of a value-judgement – that one thing is better than another.

Styles of Educational Debate

Many different patterns have been devised for educational debates, either to fit classroom schedules, to increase the educational value, or for variety. Following are the three most common types. They have proven successful in many countries, and under different circumstances. (Where two lengths of time are shown, use the shorter time for less experienced debaters).

A. Standard Debate

This is the most popular pattern in current use. This style of debate is most practical for classroom use, and is also recommended for debate tournaments in which many debate teams compete. It is easier to judge than other types.

Usually four or six speakers are selected, half of them to speak in favour of the proposal, while the other half oppose. The usual order and timing can be seen from the specimen debating exercise included.

B. Cross-Examination Debate

This style of debate has some similarity to courtroom procedure. It is good practice in quick thinking and in analysis of evidence. However, it does tempt some debaters, while doing the cross-examination, to dramatise the situation with emotionally-loaded questions and diversionary tactics.

<u>Order of speakers</u>	<u>Usual time allowance</u>
1. First affirmative speech	10 or 8 minutes
Cross-examination by second negative	5 or 4 minutes
2. First negative speech	10 or 8 minutes
Cross-examination by first affirmative	5 or 4 minutes
3. Second affirmative speech	10 or 8 minutes
Cross-examination by first negative	5 or 4 minutes
4. Second negative speech	10 or 8 minutes
Cross-examination by second affirmative	5 or 4 minutes
5. Refutation and summary by either negative speaker	5 or 4 minutes
Refutation and summary by either affirmative speaker	5 or 4 minutes

C. Parliamentary or English-Style Debate (Adapted for school use)

This style has some similarities to legislative debates. Note that the audience (called the House) actively participates in the debate. Naturally, this stimulates interest, but the format is easily abused by attempts to entertain the audience.

The President, or Chairman, calls the House to order, and reads the resolution (called the Motion).

<u>Order of debate</u>	<u>Time</u>
First affirmative speech, urging adoption of the Motion	10 minutes
First negative speech, opposing the Motion	10 minutes
Second affirmative speech, seconding the Motion, and urging adoption	7 minutes
Second negative speech, opposing the Motion	7 minutes
Now the floor is open. Any member of the House may speak once, in favour of or against the Motion. The President recognises from the floor, alternating affirmative and negative speakers	5 minutes each
<u>Interruptions of speakers are allowed, but only to request information. If the speaker does not want to yield for a question, he can simply ignore the questioner. If he is willing to answer, he sits down. The question must be addressed to the President.</u>	
Closing speech by the first affirmative is a summary in favour of the Motion	5 minutes
Now the President takes a vote of the House on the Motion. If a voice-vote is unclear, a show of hands may be counted, or written ballots may be used.	

Suggested Reading List

Bauer, Otto F., Fundamentals of Debate Theory and Practice. Chicago, Ill., et.al., USA; Scott Foresman and Co., 1966.

Good, brief introduction to debate, arranged for self-study.

Freeley, Austin J., Argumentation and Debate. Belmont, Cal., USA: Wadsworth Publishing Co., 1971.

Comprehensive book for those who want to concentrate on debating.

Ewbank, H.L., and Auer, J.J., Discussion and Debate. New York, N.Y., USA: Appleton-Century-Crofts, Inc., 1951.

Good book on discussion skills needed and preparation for debate, plus directions for holding educational debates.

Specimen Debates

A description of a specimen debate, together with a judging form, is included as an example of how a debate of type A may be organised when used for education purposes. (See violet pages 117 - 119)

2.9 BUSINESS OR MANAGEMENT GAMES

Description of Games

A management game uses a 'model' (i.e. a simulation or a likeness) of a business operation in order to give trainees an opportunity to make management decisions which show how they would manage and control the operation if they were the managers in charge.

The model used reflects realistic business situations in a compressed and often simplified fashion suitable for use in a training room in place of the real thing. Obviously, for example, a factory or store cannot be brought into the training centre. Equally apparent, the trainer cannot wait for all the problems and decisions to happen which a manager has to face and deal with in a trading period of say a year. So he brings in a 'model' of, for example, the factory and makes the problems and decisions arise in speedy fashion.

The 'model' most often is a written explanation of the factory (or whatever operation is chosen) supported by plans, graphs, etc. giving information about the size and nature of the undertaking.

The model might describe:

- (a) A particular function, e.g. marketing, production planning;
- (b) A particular unit, e.g. a factory or a store;
- (c) The whole undertaking, e.g. a company or a co-operative society, depending on the people attending the training and/or training needs identified by the educator.

Conducting a Game

After careful briefing, about the nature of the operation they are to 'manage' in the game and the decisions they have to take, the trainees, who work in groups, are asked to complete a first batch of decisions. These decisions are likely to concern such matters as:

- (a) How many staff they would employ;
- (b) How much money they would invest in the operation if they were in managerial control of the business described in the model.

After the trainees have made their first batch of decisions, umpires attached to each group will assess the group decisions. Umpires will do this assessment either by using their experienced judgement or by using criteria established before the game starts. These criteria usually show a mathematical relationship between decisions and the effect of these decisions on performance; for example, the relationship between the number of salesmen fixed by the trainees in their decisions and the amount of sales such a number would achieve.

When the decisions have been assessed by the umpires and turned by them into Performance Reports showing, for example, sales and profits achieved by the participants, they are returned to the groups.

The groups study the first Performance Reports along with their first batch of decisions and try to improve their performance by completing a second batch of decisions. They then receive a second performance report assessed by the umpires.

This process of studying the information in the model, along with the group's own decisions plus their effect on performance, thereby trying to improve the succeeding batch of decisions, continues throughout the time the game is played.

Evaluation of the Play in the Game

It is vital that the educator in charge of the game:

- (1) Discusses in a frank fashion with the participants their decisions and the effects of those decisions on the results they achieved in the game;
- (2) Establishes with the group the similarity of work in the management game with actual management decisions in their own jobs;
- (3) Finds out whether the training objectives he sets for the game have in fact been met;
- (4) Provides for any further training revealed by the playing of the game.

The evaluation of the game played by the trainees is an extremely important feature of this form of training.

Preparing a Business Game

When preparing a business game, the following principles apply:

- (1) Decide the training needs of the participants who will play the game and from these, fashion your training objectives.
- (2) Establish your training objectives clearly. Ensure that the game when prepared meets these training objectives.
- (3) Ensure that the model of the business activity being used in place of the real thing is realistic and gives the participants adequate information on which to base sensible decisions.
- (4) Make sure that the game does not make demands on members of staff, on staff experience and skill, which cannot be met.

Supplementing Business Games

Business games can be supplemented by almost any teaching aid or method, for example lectures and discussions prior to and after playing the game, and they can make use of tapes, graphs, etc. during the game.

Group Discussion

Games are almost always used and played based on group discussion and all the benefits and problems associated with group discussion methods are normal to them. The main difference between most other teaching tools and management

games is that in playing management games, the groups must reach quite specific decisions within specific time limits and those decisions are objectively assessed immediately, for future use in decision making within the game.

This demands considerable skill and ability from the staff in controlling and motivating training groups as well as requiring technical competence in conducting the working of the game itself.

Advantages of Business Games

- (1) The 'model' of the situation provides a most realistic setting mirroring the problems and decision-making which managers face in real life.
- (2) A game can compress the problems of a week, a month or a year into a very short training time.
- (3) The decisions made by the participants have a speedy and objective feed back, usually expressed in units of sales or of actual profit/loss figures achieved.
- (4) Games are interesting, absorbing competitive training exercises which can and do involve groups in quite positive management decisions.

Disadvantages of Business Games

- (1) Almost all games take a long time to prepare and need considerable skill in their preparation and production.
- (2) They also need considerable time in playing them. Therefore, in using them, educators must be sure they are achieving results which repay the time spent on them.
- (3) They demand considerable staff resource as there are a number of umpires to be provided to process the participants' decisions and to control the groups.
- (4) There can be excessive emotional rivalry between the separate groups. The educator must keep close control on this without suppressing the competitive element created by the game among the participants.
- (5) Much depends on the previous experience of the participants and if groups, or individuals within groups, are too widely separated in technical or managerial skills, problems can be created in the group decision making processes.
- (6) Appraisal of effectiveness is always difficult with any type of training and certainly examination type testing is inappropriate for Business Games. But these are the actual performance results processed and passed to each group continuously throughout the game which can act as a good starting point for measuring the improvement in trainee ability.
- (7) Games are not a gimmicky training device, but they can degenerate into this if groups are not carefully briefed and controlled.

Exercise

Test your recall of the section on Business Games by completing the following sentences:

- (a) Establish your training _____ clearly.
Ensure that the game when prepared meets these training
_____.
- (b) Make sure that the game does not make demands on members
or staff, or staff experience and skill, which cannot be
_____.
- (c) The decisions made by participants have a speedy and
objective feedback, usually expressed in units of
_____ or of actual _____/
_____ figures achieved.

3. SOME BOOKS AND READINGS

3.1 SOME BOOKS ON ADULT EDUCATION AND GROUP DISCUSSION

Compiled by: Mary Jean McGrath,
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Barker, Larry L. Listening Behavior, Englewood Cliffs, N.J. (USA): Prentice-Hall, 1971. 149 p. Bibliography, appendices, index. Paper cover. US \$ 4.95. (Also available from London (UK): Prentice Hall, 1971. £1.50)

A communication textbook that tells how to identify listening problems, and how to improve listening ability. Written in a non-technical style.

Beal, George M., Bohlen, Joe M., and Raudabaugh, J. Neil. Leadership and Dynamic Group Action. Ames, Iowa (USA): Iowa State University Press, 1962. 363 p. Reading lists, index. Paper cover US \$ 3.95.

Treats of interaction in groups; describes in outline form different group discussion techniques, and gives suggestions for evaluation of group discussions. A practical manual for adult groups and their leaders.

Bergevin, Paul, Morris, Dwight, and Smith, Robert M. Adult Education Procedures: A Handbook of Tested Patterns for Effective Participation. New York (USA): Seabury Press, 1963. Glossary, reading list. Paper cover. US \$ 3.95.

A step-by-step planning guide, describing 14 adult education techniques.

Berne, Eric. The Structure and Dynamics of Organizations and Groups. New York (USA): Ballantine Books, 1973. 333 p. Bibliography, glossary and index. Paper cover. US \$ 1.95.

A psychological explanation of the functioning of groups, written in a clear, informal style, with all technical terms explained. Well-documented.

Bion, W.R. Experiences in Groups. New York (USA): Ballantine Books, 1974. 177p. Index. Paper Cover. US \$ 1.65. (Also available in London (UK) : Tavistock Publications, 1959, and Social Science Publications - paper cover. £0.90, under the title, Experiences in Groups and Other Papers.)

Insights of a psycho-analyst on the behavior of people in groups, based on his work in group therapy.

Brilhart, John K. Effective Group Discussion. 2nd. rev. ed. Dubuque, Iowa (USA): Wm. C. Brown Co., 1974. 208 p. Index, reading lists. Paper cover. US \$ 4.95.

A practical text on group discussion. Describes different methods, with practice exercises.

Cartwright, Dorwin, and Zander, Alvin, eds. Group Dynamics Research and Theory. 3rd rev. ed. New York (USA): Harper and Row, 1968. 580 p. US \$ 14.95. (Also available in London (UK): Tavistock Publications, 1968. £4.95 and Social Science Publications - paper cover, £2.50 Published in Spanish under the title, Dinámica de grupos - Investigación y teoría. Mexico: Editorial Trillas, Av. Cinco de Mayo Num. 43, Mexico 1, D.F.)

Davis, James H. Group Performance. Reading, Mass. (USA): Addison-Wesley Publishing Co., 1969. 115 p. Bibliography. Paper cover. US \$ 2.95. (Also available from Addison-Wesley, West End House, 11 Hills Place, London, 12 LR.UK)

Reports the findings of research on task-oriented groups; their structure and performance.

Freire, Paulo. Education for Critical Consciousness. New York (USA): Seabury Press, 1974. 164 p. Paper cover. US \$ 2.95.

(This is a translation, with an introduction by Denis Goulet, of two essays, Educação como prática de liberdade, published by Editora Paz e Terra, Rio de Janeiro, 1969, and Extensión y comunicación, published by Editorial Tierra Nueva, Montevideo, 1971)

A profound book, that will affect all future practice of the cooperative educator who understands and accepts Freire's message. Illustrated with materials he used in educating illiterates in Brazil.

Kemp, Jerrold E. Instructional Design: A Plan for Unit and Course Development. Belmont, Calif. (USA): Fearon Publishers, 1971. Appendix, Bibliography. 130 p. Paper cover. US \$2.75. (Spanish edition, Planeamiento didáctico-Plan de desarrollo para unidades y cursos. pub. 1972 by Editorial Diana, Tlacoquemecatl, Esq. Roberto Gayol, México 17, D.F.)

A manual for teachers, on developing learning objectives, subject content, teaching activities and evaluation techniques.

Kemp, Jerrold E. Planning and Producing Audiovisual Materials. 3rd ed. New York (USA): Thomas Crowell, 1975. 250 p. Glossary, bibliography, index. Review questions. Lists sources of materials and equipment. US \$ 10.00

Covers selection of media for different purposes, results of research on effectiveness of various audio-visual techniques, and detailed procedures for producing audio-visual materials. Profusely illustrated.

Knowles, Malcolm S. The Modern Practice of Adult Education. New York (USA): Association Press, 1970. 384 p. Index. US \$ 14.95.

A comprehensive manual on the planning, organization, operation and evaluation of all types of adult education programs. Based on conditions in the USA, but much of the material would be useful in any country. Primarily addressed to the full-time, professional adult educator.

Knowles, Malcolm S., and Knowles, Hulda F. Introduction to Group Dynamics. rev. ed. New York (USA) Association Press, 1973. Index, bibliography. 91 p. US \$ 4.50. (Spanish ed. Introducción a la dinámica de grupo. Editorial Letras, Av. Morelos 37- 4 piso. México 5, D.F.)

Good clear, brief introduction to group dynamics: basic concepts, major research findings, and practical applications.

Thelen, Herbert A. Dynamics of Groups at Work. Chicago, Ill. (USA): University of Chicago Press, 1954. 374 p. Indexed. Paper cover. US \$ 2.45.
(Also available in London (UK) Phoenix Books, 1954. Paper cover. £1.10)

Analyses experiences as citizens, in school and work life in groups, and offers suggestions for training in group participation, and for improving meetings.

3.2 SOME BOOKS AND READINGS ON THE CASE METHOD

Compiled by: Mary Jean McGrath,
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The use of case studies can improve the teaching of practical aspects of co-operative operation.

Cases and the methods of instruction used with them, range all the way from casual discussion of brief incidents by groups of adult volunteers in short-term training sessions, to the analysis of elaborately documented and detailed case studies as the major method in two-year courses at the Graduate School of Business Administration at Harvard University. Also, many people are familiar with the long tradition of using the case system in law schools.

Naturally, you will want to do more reading if you plan to use the case method in your teaching. Following is a selected list of books, from which the excerpts below were made.

Andrews, Kenneth R. ed. The Case Method of Teaching Human Relations and Administration. Boston, USA: Harvard University Press, 1953, 1960.

British Institute of Management. Case Study Practice. Bedford, England: The Sidney Press. 1960. (A 53-page booklet)

Kidd, J.R. How Adults Learn. New York: Association Press, 1959.

Pigors, Paul and Faith. Case Method in Human Relations: The Incident Process. New York, USA: McGraw-Hill, 1961.

Stenzel, A.K. and Feeney, Helen M. Learning by the Case Method: Practical Approaches for Community Leaders. New York, USA: Seabury. 128 p. paper cover.

Towl, Andrew R. To Study Administration by Cases. Boston, USA: Harvard University Graduate School of Business Administration, 1969.

Zoll, Allen A. Dynamic Management Education. 2nd ed. Reading, Mass., USA: Addison-Wesley, 1969.

I. What is Case Method?

For the benefit of those unfamiliar with business-school cases, it is merely necessary to explain that, as now used, a case typically is a record of a business issue which actually has been faced by business executives, together with surrounding facts, opinions, and prejudices upon which executive decisions had to depend. These real and particularized cases are presented to students for considered analysis, open discussion, and final decision as to the type of action which should be taken.

Charles I. Gragg in Andrews, P.9

A case, as used in management education, is a written or filmed description of an actual or imaginary situation, and is usually presented in some detail. A case may deal with the total enterprise or with a problem occurring within a specific area such as Marketing or Personnel . . . A case may consist of several pages, or 50 or more . . .

P. 10, Zoll

Many teachers who use cases feel that a case must be a description of an actual business or administrative situation . . . When the learners are assured that the case is a description - however imperfect - of a real situation, it becomes believable and interesting regardless of how unusual it is.

P. 11, Zoll.

A case example, case history, or incident becomes a teaching-learning aid when the individual learner or group recognizes the significance for its own thinking and acting, through the help of questions about the situation . . .

The case situation with a conclusion may be a success story and the questions must help the student find out why it was successful, what conditions contributed to its success, which factors were accidental and which planned, and under what different conditions the same or similar action might be successful.

Or the case may feature poor practice and the questions must help the learner to analyse just what the difficulties were, how they might have been avoided and how they could be avoided in a similar future situation.

More frequently, the realistic case will involve a mixture of both so that positive and negative aspects are exposed by means of questions.

P. 55 - 56, Stenzel and Feeney.

. . . The case method does not have one model but a complex and flexible system of choices from which a professor creates his own pattern . . .

P. 169 - 70, Towl

II. Benefits of the Case Method

There are a number of advantages to the use of the case method.

The participant is required to develop his own ideas rather than having principles "told" to him, and as a result, is helped to think for himself.

The method involves the learner directly and maintains his interest . . .

The participants in a case discussion are forced to reason clearly and logically because the method requires a careful sifting of the facts available and a realistic assessment of what is to be done.

The student practices the skill of communicating effectively as he discusses his ideas and the ideas of others in the group, and as he endeavors to organize the issues involved and the solutions proposed.

The art of listening becomes a by-product, too, because all the factors must be considered, not just a select few; another participant may have found something that had been overlooked when the case was first presented.

The result of such group discussion is often a change of attitude, if not behavior itself.

P. 10 - 11, Stenzel and Feeney

In the early days of their experience with cases, learners are often anxious to know "the answer" or how the case "came out". After a while, though, they come to understand that the problem-solving process is the important thing to learn, not solutions to the cases themselves.

P. 30, Zoll.

. . . What makes a particular case useful is its reality, its relevance to the problems faced by others, the completeness of available data, and the significance of the issues or values at stake . . .

P.260, Kidd

Central to the case method is the learners' discussion of the cases. Each learner exchanges his views, opinions, attitudes, and interpretations with others. In doing so, he sees the wide variety of views possible about facts he thought were obvious. This helps him begin to gain insight into his own habits of viewing and thinking about the world.

P. 30, Zoll

III. Problems and Restrictions with the Case Method

If the teacher is to use cases to teach analysis, the cases must be of some complexity (which means they require study time) and the learner must be exposed to a succession of them over an extended period . . .

Another difficulty is that the learner is limited, in his understanding of the case, to the information presented, . . . unless the case is very complete and well written, this can be frustrating to the learner . . .

Another problem is that the transfer of analytical skills from cases to more complex, real situations may not be easy.

P. 30, Zoll

The case method often frustrates the participant who is seeking "the right answer" and who tends to look to the instructor for firm direction.

. . . A skillful leader must be able gradually to lead the dependent and sometimes doubting participant to have faith in his own ideas and to become independent of the leader. Therein lies the challenge of the case method . . .

Lack of skill in selecting a suitable case, particularly in informal adult education or for short term training, can be a hazard for the unwary. Unless the trainer-leader has clear educational objectives in mind when using the case method, the result can be most unsatisfactory . . .

P. 11 - 12, Stenzel and Feeney

Some professors . . . in effect abdicated the role of leadership and left the class members to struggle for power. Discussion does not automatically insure learning . . . At the other extreme, a professor might introduce a case, but in order not to risk the loss of his ordered view of his subject, he would then give a lecture on the case . . .

P. 191, Towl.

IV. Types of Cases

In the descriptive case (which includes a solution) the discussion consists of an analysis – factors contributing to the situation, possible reasons for people acting or reacting in a given way, additional facts needed for the understanding of the situation, and other questions searching for explanations . . .

In the action case where a solution to the problem is not given, the discussion explores possibilities for action and various consequences, pro and con, of such actions . . .

P. 44, Stenzel and Feeney

The characteristics of the Harvard Case are:

- long and heavily documented case situations;
- non-directive approach on the part of the discussion leader;
- equal access to the complete information about the case by both students and instructors;
- intensive research required to find real issues to use in the preparation of cases; and
- extensive reading and study by students.

In the Harvard Approach, the group does not have to reach one definitive conclusion. The hard mental exercise of sifting and weighing the issues from large amounts of data is considered advantageous enough, since the ability to reason logically and clearly is emphasized . . .

The Abbreviated Case is actually the same as a longer case used in the Harvard Approach, but usually contains only two or three pages of description. The high points are presented and all extraneous detail, unless relevant to the case, is eliminated . . . The student group can grasp the key issues in a problem almost at once and the discussion leader's task becomes mainly that of keeping the discussion on the track . . .

The Incident Process is a fact-finding exercise incorporated into case discussion . . . The method is directive rather than non-directive, and only the leader or instructor has access to full information. The student group is required to ferret out the information, bit by bit, by asking questions. The idea is to provide an incentive for pointed questions and analysis by giving an "incident" which exposes the problem. This is to simulate an actual problem arising in business or industry whereby an executive is first exposed to a problem by some incident that brings it to his attention. .

The Recorded or Canned Case is actually a recorded dramatization of a case problem such as a grievance hearing, a labor dispute, an interview, a conversation, or a heated argument on some specific situation . . . While this type of case limits the analysis of some management problems, it provides the human or interpersonal dimensions of a problem . . .

P. 115 - 117, Stenzel and Feeney

V. On Teaching by the Case Method

There is no formula . . . This may be disconcerting for the person who wishes to teach by the case method.

P. 13, Andrews.

The prevailing way of presenting case materials in higher education - business administration, social work, etc. - is in writing. Every student has the case on hand for preparation at home and for reference during class sessions. This is necessitated by the length and complexity of the average case used . . .

P. 42, Stenzel and Feeney

Under the case system, the instructor's role is to assign the cases for discussion, to act as a responsible member of the group delegated to provoke argumentative thinking, and to guide discussion by his own contributions and questions toward points of major importance; and if he chooses, to take a final position on the viewpoints which have been threshed out before him . . .

Gragg in Andrews, P.9

Remember, it is the process of analysis you are teaching, not a particular analysis about this case. To withhold your judgement is essential. The important requirement for learning by the case method is self-discovery; the teacher must resist the impulse to try to pass on his own discoveries to the learners.

P. 33, Zoll

The instructor - whether in formal or informal education must be concerned with the creation of a learning environment in which the group members will not expect ready-made answers from the teacher or expert . . .

As far as preparation for handling the topic is concerned, the leader must under no circumstances permit only an "exchange of ignorance" to take place because of lack of readiness on the part of the students to recognize the various facets of the case situation . . .

P. 42, Stenzel and Feeney

In the study of a case it is a mistake to think that merely reading a few pages will produce a working understanding of the enterprise. Cases are something like dehydrated vegetables. They need analysis and discussion to bring back to life-like form the situation calling for decision by management . . . Students frequently make much more progress with a case if the blackboard is used liberally to make clear some of the basic relationships in the case as they come up in the class discussion. . .

P. 178, Towl

. . . The teacher seeks to draw his students beyond the stages of moralizing, theorizing and witch-hunting and to bring their attention again and again to careful analysis of all the known relations in the events under study . . .

P.29, Andrews

I have come then to realize that there are five or six different action questions. First, "What did X do?" Second, "What might he have done?" Third, "What will he do now?" Fourth, "What would you do?" Fifth, "What should be done?"

First, "What did he do?" -- For a while, as a teacher, I didn't bother my students with this question; I figured they had all read the case and they all knew what had happened . . . Yet rather extraordinary things happened when I started asking them. I found it very worthwhile and much more complex than I'd ever realized. The simple act of observing what a person said to someone else is not easy . . .

Prof. F.F. Lombard in Towl, p. 186

Many students are tempted to read through cases quickly as a kind of story and then to engage in a rather haphazard, easygoing "bull session" so general and abstract as to be of little value. The remedy for this, we think, does not lie in a rigid censorship over what students can say, for that is likely to kill all exploratory discussion. Rather, the solution seems to be for the instructor to have the details well in mind, to ask questions which continually relate back to the case data, and to check with other members of the class on the accuracy, completeness, and relevance of a student's references . . .

Clover & Hower in Andrews, p. 15

On different ways to open discussion - and why some are not good

. . . Some professors seemed to open the class meeting by directing attention away from the case, to the subject. This type of opening failed to reward the student who had spent time the night before analyzing the case . . .

. . . Another . . . went to the other extreme and started off with the action question "What should be done?" . . . The one . . . who had spent hours the night before preparing thereupon gave a lecture for the next 20 minutes or half hour, while the rest of the class become restless . . . So while one "good student" was being rewarded, the instructor was losing the rest of the class.

. . . A third category of classroom openings apparently stemmed from some realization that there needed to be a common understanding of the facts. The professors who felt this way gave a 10-minute to 15-minute explanation of the facts of the case. This killed the interest of those students who were well prepared to discuss the case, and confirmed the impression of the others that it really was unnecessary to do much homework for this instructor . . .

P. 170 - 172, Towl

When you're using the case method, it helps if you have your goals clearly in mind. Some beginners make the mistake of merely passing out a case and then asking for comments. You must know why you are using the case method and why you have chosen this particular case. You will find it helpful to share your goals with the group and share with them the responsibility for making their discussion and the course more meaningful . . .

P.31, Zoll

3.3 SOME BOOKS AND READINGS ON ROLE PLAYING

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Here are some brief readings to give a wider perspective on role-playing as an educational technique. These have been grouped according to topic, with source shown at the end of each quotation.

A variety of authors is presented to give more perspective on role-playing. Naturally, if you plan to use this technique in your training sessions, you will want to do more independent reading on the subject. Works quoted are:

Beal, George M., Bohlen, Joe M. and Raudabaugh, J. Neil, Leadership and Dynamic Group Action. Ames, Iowa: Iowa State University Press, 1962. (USA)

Bergevin, Paul, Morris, Dwight, and Smith, Robert M., Adult Education Procedures. New York (USA): Seabury Press, 1963.

Barnlund, Dean C. and Haiman, Franklyn S., The Dynamics of Discussion. Boston, Mass. (USA): Houghton Mifflin, 1960.

Schaftel, Fannie R. and George, Role-Playing for Social Values. Englewood Cliffs, N.J. (USA): Prentice-Hall, 1967.

Staton, Thomas F., How to Instruct Successfully. New York (USA): McGraw Hill, 1960.

Thelen, Herbert A., Dynamics of Groups at Work. Chicago, Ill. (USA): University of Chicago Press, 1954.

1. The Background of Role-Playing

To the best of my knowledge, the technique of role-playing which children employ entirely spontaneously, was adapted to use of adults by Dr. J.D. Moreno, of the Psychodramatic Institute in New York. He worked out two quite different models, which he called "psychodrama" and "sociodrama". With each of these models he developed a rather complete and detailed rationale and language. Psychodrama, according to Moreno, is a scheme for giving individual therapy through acting-out rather than talking-out procedures. It should only be used by a skilled and adequately trained therapist, and it has no place in this discussion.

Sociodrama, on the other hand, is one form of what has loosely become known as role-playing. In general, sociodrama is for the purpose of testing ideas in advance of putting them into effect in a "real" situation. It is, then, a means of rehearsing action and, through subsequent diagnosis of the action, identifying various factors that enter into the situation. Sociodrama is often used in this way in laboratory training groups.

P. 192, Thelen.

II. What is Role-playing?

Role-playing is a spontaneous portrayal (acting out) of a situation, condition, or circumstance by selected members of a learning group.

Role-playing emphasizes relationships among people. Role-playing is done by members of the learning group who try to portray typical attitudes, rather than by persons having special acting abilities. After a problem or situation has been illustrated by role-play, the learning group discusses and interprets the action through the use of another technique such as group discussion.

P. 135 Bergevin, et al.

To teach human-relations skills through actual practice in a laboratory situation, a procedure known as "role-playing" has been evolved. Role-playing is just what the name implies: a situation is described, the characters in it are identified, and people are assigned the character roles and told to compose their own lines and act the part of these characters. In doing so, they get actual practice in conducting themselves in situations like the one in which they are acting. Their learning is reinforced by analysis and discussion of the little drama - why the actors said and did what they did, how they felt, how else they might have reacted, and so on.

P. 125, Staton.

The dramatization of a problem or situation in the general area of human relations is called role-playing. The acting out of various roles is one of the oldest forms of human communication, but the structured and contrived use of this device as a group technique introduces many new elements . . .

Usually two or more persons act out a brief human relations "scene" from a hypothetical situation, performing their roles as they think a real situation would develop. An immediate and highly pertinent set of data are thus developed for the performers, observers, and total group to consider.

P. 251-2, Beal, et al.

Role-playing is a kind of "reality practice". It enables groups to relive critical incidents, to explore what happened in them, and to consider what might have happened if different choices had been made in the effort to resolve the problems involved.

P. 65, Schaftel

Role-playing is a group problem-solving method involving a variety of techniques - discussion, problem analysis, and definition through (1) initial enactment of proposals (taking on of roles), (2) observer reactions to the enactments (discussion), (3) exploration of alternatives through further enactments and discussion, and often (4) the drawing of conclusions or generalization and decision-making. p. 83, Schaftel

All uses of role-playing have this in common :

1. The situation to be enacted is a dramatic one, with a beginning, middle and end. It is not a sugar-coated panel discussion; there is a problematic situation, with suspense and point.

2. There is no script, written line-by-line. The skit is developed from a consideration of the nature of each of the characters in the scene, their attitudes toward each other, toward the problem, and toward various factors entering into the problem. In effect then, the plot is what you get when people of different sorts are thrown into a situation together. It is dramatic to the extent that these people, in their different roles, come into conflict with each other, or develop some other quality of personal relationship.
P. 192 - 193. Thelen

In general, the chief procedures in this use of role-playing are:

1. Pick a typical, familiar, and problematic situation.
2. Demonstrate different ways of dealing with it, without trying to make one "bad" and another "good".
3. Prepare the audience to look for differences in the way the characters act (descriptive) and how they feel (inference, usually).
4. "Cut" each scene as soon as it has made its point or presented an adequate sample of behavior.
5. Discuss the scenes, writing on the blackboard the group's answers to the questions.
6. Check the various ideas as to how the characters felt against the testimony of the characters themselves.
7. Go from this point into discussion of the different assumptions on which action was based, or into generalizations that may be true of other situations "like" these, or into incidents in the history of the group that come to mind, or into possible explanations of why people react the way they were portrayed.
P. 199, Thelen.

III. On Planning and Procedures of Role-Plays

. . . . To realize its maximum potential a role-playing episode has to be planned quite as carefully as a lecture, perhaps even more carefully, because in the lecture the instructor controls what develops and does not have to guard against odd-ball developments which might throw him off track. In the role-playing situation the actors compose their own lines and determine the direction the episode will take, and the instructor has to be prepared to take what happens and model a worthwhile learning experience out of it.
P. 129, Staton

A. Structuring the Situation

1. Structure the situation to fit the specific learning outcome you wish trainees to achieve . . .
2. If your objective is to explore the personality and methods of character (an executive type, a certain type of supervisor, etc.), define the situation closely to direct players into the course of action desired, but do not describe the characters minutely; let the actors explore and construct them. On the other hand, if a problem, a situation, is to be explored, concentrate on describing the characters so that they will develop the situation along the general lines desired, and do not tell them too specifically just how they should handle the situation. In short, give your actors freedom to explore and exercise initiative in the area you want studied.

3. Make the situation resemble conditions the trainees actually face in their daily work. Keep it believable, typical of situations they will face, not a fantasy. . . .
4. Describe a situation in enough detail for everyone to envision the same circumstances surrounding it . . . P. 130-132, Staton

. . . Recognize that role-playing may vary from a relatively tightly-structured device to a very loosely-structured one. The situation may be precisely defined and the instructions to the role players as to the type of roles they are supposed to play may be very specific. In a more loosely-structured role-playing scene the general situation is defined and players create their own roles as they play the scene. All conceivable variations and combinations within the general structure of role-playing may be used. P. 256, Beal, et al.

B. Choosing the People Who Act in the Role-play

If possible, cast your characters and assign each his part a day or so before the episode is to be played so they can be thinking about their roles, identifying themselves with their parts. Tell them the roles they are to play and the situation to be played. You may want to give them written character sketches of the persons they portray, or a written detailed description of the situation of the episode. Encourage them to do some thinking as to the best way of playing the roles - not, of course, to compose lines beforehand, but to think about their parts and the episode until they get the feel of it. P. 138, Staton

To avoid having people thought of as doing and saying things themselves, where it should be clearly recognized that they are merely acting parts, always give players names different from their own, as well as characters and descriptions easily recognised as not genuinely fitting them. By doing this you can minimize self-consciousness in your players, make the audience feel freer to analyze and criticize the action, and get heartier co-operation from everyone.

It is generally better, in a training situation, for the instructor to assign people to the different roles rather than ask for volunteers. P. 136. Staton

Is there a person in the group who is overly brusque and unfeeling in handling subordinates? A sincere playing of the role of Joe, who is late because he has a sick wife and two small children at home, may do more to show him the other side of the picture than any amount of lecturing or explaining . . .

Try to avoid casting two or more persons in roles which will enable them to play up strong conflicts of opinion you know to exist between them. You will turn your training session into a boxing ring, and they will merely emerge more strongly entrenched in their respective positions. The idea is for each player to get a broadened viewpoint, an insight into the position or feelings of someone else, or a new or improved way of handling a situation. P.137, Staton

. . . Caution should be exercised if some of the roles are deprecating. It is usually better to let people who have status in the group play the deprecating roles. Care should be used in most cases to not too closely "type cast" roles. If there is a relatively low level of maturity in an individual or in the group, it may be dangerous to put a person who is relatively insecure in a role-playing situation that emphasizes his insecurity . . .

P.257, Beal, et al.

C. Prepare the Audience and Participants for the Episode

. . . Probably as much loss of potential learning in role-playing instruction is due to starting everyone off cold on a situation instead of warming them up to it, as is attributable to any other one defect.

Talking about the objective of the role-playing during the present period, explaining the skills and insights, it is hoped will be acquired, is a good starting point to warm up the group for a situation. If you can get trainees to talk about what insights they think they might get, that is fine. Read the situation aloud, even if everyone has had a copy, and invite comments or questions . . . P. 139, Staton

. . . Ordinarily the members of an audience who are watching a role-playing scene are given only a description of the general situation and are asked not to look at the specific briefings of the participants. In this way they can view the scene from the vantage point of an objective observer and thus be given an opportunity for practice in analysis . . . P. 416, Barnlund & Haيمان

D. What is Expected of the Audience?

- a. They should make appropriate preparation in the form of reading or thinking about the problem or situation;
- b. They give moral support to the actors and do not evaluate or criticize the acting;
- c. They should carefully observe the role-play in the light of the goals stated, and in the manner suggested, by the leader;
- d. They should contribute to thoughtful analysis and discussion following the role-play. P. 143, Bergevin

Ideally, every person in the group should have an active part to play in each role-playing episode. If the group is large, this may best be achieved by dividing it into smaller groups of three or four and asking each group to pay particular attention to one aspect while watching the action . . .

If everyone is thus involved, as an individual or member of a small group, in a particular task during the role-playing, it will greatly increase motivation, reaction, concentration, and comprehension throughout the group. It also provides much richer analyses and interpretations than the instructor can make all by himself. P. 140 - 141, Staton

E. When to Stop the Acting

. . . Cut the scene. Where and when the scene should end will depend upon the purposes for which it is being used, on the development in terms of useful data provided, on the degree of emotional involvement, and upon optimum conditions of audience interest. The scene should run long enough to supply adequate data for discussion, but will seldom be permitted to run to its logical conclusion. It is a common error to let the scene run too long. P. 258-259, Beal, et al.

. . . Open discussion after the scene is played. It is often good practice to let the actors themselves react first to the scene. This gives them an opportunity to give a rationale for their actions and to protect their egos before the group as a whole comments - often a group is extremely critical of role players.

. . . In any post-role-playing discussion it is well to include: (a) general agreement as to what actually happened; (b) a fairly deep probing for explanations; and (c) a request for suggestions that might change or improve the process.

F. Analyse the Episode

This is the point where the skill of the instructor really determines whether the role-playing episode will produce valuable understandings and skills in the trainees or whether it will be merely an amusing little caper from which some people might pick up some ideas. If he asks questions and makes comments which direct attention to crucial elements in the episode and which stimulate mental reaction about the implications of those elements, no other method can approach role-playing as a technique for developing human-relations skills and understandings.

Analysis of a role-playing episode is too complex and judgement-involved a process to be reducible to a pat formula . . . but at least these points should be covered:

1. What happened? Did people reach an understanding? Was the problem solved, or a temporary solution reached? What went on in the episode? . . .
2. Why did it happen this way? . . . If a mutually-acceptable conclusion was not reached in the episode, why was it not? What got in the way? In short, why did it turn out as it did, and what could have been done about the reasons? . . .
3. What were the motives and feelings involved? . . . One of the valuable things about role-playing as a method of teaching is that it clearly brings out the fact that in human-relations situations, people's feelings get into the act quite as much as their minds. So in the analysis give this important factor its full due. Have observers watch for indications of feelings helping or hindering co-operation. Analyze the characters and how they played their roles, and try to determine what these feelings were, where they came from, how they affected the progress of the discussion, and how they could have been accentuated or diminished. . .
4. What variations would have produced other results? The element of analysis is basically to stimulate trainees to use their powers of observation and interpretation to find alternate ways of handling a situation. It is imagination applied to human-relations situations. Its keynotes are such questions as, "What other way could Mr. Jones have . . .? What would have happened if Lou had . . . instead of . . .?" The answers to such questions suggest variations in the episode which can be made the basis of replays . . . It is a fine last step in the analysis because it leads naturally to the instructor's saying, "Let's play it over again, with you two handling it this way, you two this way, and then meet again to see what happened when you followed these paths".

P. 152 - 154, Staton

. . . A scene is replayed to contrast two ways of doing something or show the effects of a change in the behavior of one or more of the players.

An example of this would be a role-play showing the "wrong way" for an employee to handle an angry customer, followed by the "right way". Sometimes in replaying a scene, roles are reversed. This means that a player who has just played one role now takes another. This is done in order to allow the player to experience the situation or problem from another point of view. The effects of the reversing of roles would probably be discussed by the audience following the role-play; the player who reversed roles would be asked about differences in his feelings and his reactions as he goes through the scene a second time. A scene should be replayed only for definite reasons . . .

P. 140, Bergevin, et al.

G. Evaluate, Summarize and Discuss the Episode

The final step in any episode should ordinarily be looking at it as a whole and determining what can be concluded or surmised from it. This makes sure trainees comprehend the significance of what they have heard and seen. The instructor can lead off by saying, "What can we conclude from the play-throughs we have just done?" It is the wrap-up, the synthesis of the lesson . . .

P. 155, Staton

In conclusion, we should like to remind the reader that the chief precaution for handling discussion subsequent to role-playing sessions is always and forever to maintain the attitude that we have in front of us a sample of behaviour to look at, but we are not competent to judge whether it is at all typical of the actual personalities of the role-players. Such speculations must be ruled out. And second, it is good policy to follow the group's lead in discussion. If members get into a discussion of "deep" factors that may be involved, one can keep the discussion "safe" by turning it onto the question of: "What further evidence would one need to decide among these hunches?" If the group wants to discuss the scene at a seemingly superficial level, that is their privilege, and probably is evidence that they are not yet ready to go deeper. Such evidence should be respected.

P. 201, Thelen

IV Cautions

1. Begin role playing with relatively simple situations. It is important that the objectives are clear and the situation is well-defined.
 2. Role-playing is a means to an end. Groups which become enamored of the technique may turn into an amateur theatrical society, playing the scene for the enjoyment they receive rather than for a distinct task oriented purpose.
 3. Spontaneity is a most important element. Structuring too tightly, writing parts or rehearsals often spoil the effect.
 4. Role-playing often invades deeply into the individual's feelings and personal problems. Immature groups must be cautious in setting up a situation with regard to the depth of the anticipated emotional involvement. Skill in the extrication of a group from such an over-involvement is a most valuable tool.
- P. 260, Beal, et al

V. On the Value of Role Plays

. . . Such practice provides us with an opportunity to learn from our mistakes under conditions that protect us from any actual penalty and in situations in which we have the sympathetic help of group members in exploring the consequences of various choices of behaviour we might have undertaken. P.65 Schaftel

Role-playing can also provide a means of attacking new problems of human relations, of applying insights out of past experiences, and of trying out new methods to meet problems for which there may be no precedents in our past.

P.65, Schaftel

. . . Some of the critics of role-playing raise objections. They feel it is impossible to derive useful practice from mock sessions, which, no matter how well acted, are bound to be somewhat artificial. . . . the same kind of objection that is raised against role-playing can also be levelled against any educational program, because no two situations are ever exactly alike and there is always the problem of transfer of learning from one setting to another. If students are made aware of this, and seek to discover basic principles of operation rather than specific patterns of behavior which they can literally transfer in toto, then the artificiality of role-playing is no more of a handicap than any other off-the-job educational program.

P. 382 - 383, Barlund & Haiman

4 SPECIMENS

4.1 SPECIMEN RANKING EXERCISES

1. Purposes of Staff Education.
 2. The Ideal Committee Member.
-

SPECIMEN RANKING EXERCISE NO. 1

Contributed by the International Co-operative Training Centre,
Stanford Hall,
Loughborough, U.K.

CO-OPERATIVE EDUCATION - PURPOSES OF STAFF EDUCATION

Please discuss the suggested purposes of staff education listed below and number them in order of importance. Place number 1 against the aim which the group decides is the most important, number 2 against the second most important and so on the number 9 against the least important.

Work as a group without appointing a formal discussion leader.

Now read the statements carefully until the signal is given for discussion to begin.

Suggested Purposes

- To increase staff knowledge of the value of Co-operation.
- To increase staff belief in the value of Co-operation.
- To increase the efficiency of staff in the jobs they are doing now.
- To increase the efficiency of staff throughout their career.
- To locate and develop those people among the general body of the staff who will be the future leaders.
- To improve the general education of the staff.
- To improve the ability of the staff to make intelligent choices in all areas of their life.
- To convince staff that it is possible for them to make a significant contribution to improving the life of the community.
- To entertain the staff.

SPECIMEN RANKING EXERCISE NO. 2

THE IDEAL COMMITTEE MEMBER

Please discuss the suggested qualities and qualifications looked for in the ideal Committee Member and number them in order of importance. Place number 1 against the one which the group considers most important, number 2 against the next in importance, and so on down to number 12.

Work as a group without appointing a formal discussion leader.

Suggested qualities and qualifications

- Ability to understand facts and figures.
- Good knowledge of Co-operative principles and organisation.
- Honesty and integrity.
- Ability to argue a case and to discuss issues.
- Good knowledge of members' needs and problems.
- Good standing as a leader in his community.
- Open minded, willing to listen and to learn.
- Strong concern for the interests of members.
- Hard working and willing to take responsibility.
- Higher than average education.
- Ability to work well with others, very co-operative.
- A good trading member, loyal to the Society.

4.2 SPECIMEN CASE STUDIES

1. Le Papillon Co-operative Transport Society
2. The Agricultural Co-operative of Bambia
3. Course Planning
4. Dugdhagram Dairy Co-operative Society
5. A Visit of Snoralong
6. Co-operative Cotton Marketing in Ictstania
7. KEYO Cane Production Society
8. Popularising Artificial Insemination

SPECIMEN CASE STUDY. No. 1

LE PAPILLON CO-OPERATIVE TRANSPORT SOCIETY

This Society was founded to buy a lorry to carry the sugar cane grown by its members to the factory. The members had experience of co-operation as they were drawn from three different Co-operative Credit Societies. The Secretary combined his new job with continuing as part-time Secretary of two of these Co-operative Credit Societies. The members were motivated partly by difficulties they had had with transport contractors and partly by a wish to use up part of their entitlement from the Sugar Planters Rehabilitation Fund (see Background Note 5).

The Society has run into various difficulties and you have been asked to advise them:-

- (A) Members are often disloyal if contractors offer lower transport charges or collect cane at the precise time the member prefers. Contractors have reduced their charges since the Society started to operate. The Committee say that they can only raise enough revenue to cover the costs of the lorry if they increase the charges to members. However, they fear that if they do increase charges, they will lose business. Already there are times within the cutting season when the lorry is not fully used.
- (B) Two members of the Committee have offered to buy the lorry from the Society. They are popular with members because they argue in favour of low charges for use of the lorry, saying that members should only pay enough to cover fuel, wages and maintenance. Also many members are attracted by the expectation that, if the lorry is sold, they will get more money out of the Society than they paid in as shares. In practice, they are unlikely even to get 100% back for their shares. The Society's Creditors will have first charge on its assets and the two Committee members may manage to buy the lorry for its book value rather than its current market value. Anyway, the part of the Co-operative's assets which is in the reserve fund is indivisible.
- (C) All the planters would like their cane cut and transported in the dryest months, which are September and October. If they are asked to accept transport in other months they use private contractors as described in A above.
- (D) The planters who grow sugar on the mountain side present special difficulties. The access roads tend to be blocked in wet weather, particularly as the planters say they cannot afford to maintain the drains to prevent flooding. This means that any plans made for the use of the lorry get upset. Whatever the weather it takes longer to collect from the mountain side than from the flatter country, and the wear and tear on the lorry is greater. There is also difficulty with the planters who want less than a full lorry load collected. Although private transporters charge extra for small loads or for collecting from the mountain side, the Co-operative has so far stuck to the principle of making the same charge per ton/mile to all members.

(E) The Secretary of the Society has persuaded the Committee to employ his brother as driver. The driver has failed to check the oil and thereby caused the Society expense. He later carelessly drove the lorry off the road.

The lorry is sometimes being used by the driver and the committee members for their own purposes, not connected with carrying sugar cane. No log book is kept.

(F) The Society has to pay workmen's compensation because a man it employed to cut cane has been injured.

(G) The lorry is at present used only during the cutting season. This means that all the costs have to be covered during that period. There is no proper place to store the lorry in the inter-crop season. It is difficult to recruit labour to work with the lorry since people are reluctant to take jobs which last for half the year only.

A Government agency has offered some work during the inter-crop season (January to June) at a rate which would cover fuel, wages and maintenance but the Committee has rejected it because the amount offered is less than they charge their own members in the cutting season and less than the average cost of running the vehicle. Anyway, this Government work would last for only one month.

The lorry is at present licenced and insured for only six months of the year. The by-laws of the Co-operative only allow it to do business with members. The Co-operatives want the Government to allow them a licence for the whole year at a reduced rate and also to allow them to do business with non-members.

BACKGROUND NOTES

- (1) Sugar cane is cut from July to December.
- (2) Fertiliser is applied to sugar cane soon after cutting or soon after planting new canes.
- (3) Sugar cane can be planted from April onwards but most small farmers prefer to plant it between July and December, either because they cannot get planting material earlier or because they have no land cleared for planting until they have cut the old cane.
- (4) Vegetables can be harvested at most times of year.
- (5) The Sugar Planters Rehabilitation Fund collects deductions from the sale price of all sugar. It then makes grants to planters who can show that they have a capital project which will benefit sugar production. The maximum amount of grant a planter can receive is related to the amount of sugar cane he has sent to the factory. Entitlements are forfeited if not claimed within ten years, which means that if a planter does not claim for twelve years, he loses his entitlement for the first two years.
- (6) The Secretary has been on a three month training course and he keeps the records of the Society accurately. There is a five minute talk on Co-operatives on the radio once per week. Two of the Committee members have recently attended a two day seminar organised for Co-operative Credit Societies in the neighbourhood. There has been no other Co-operative training.

All Committee members and 80% of the ordinary members are literate.
- (7) You may make any other assumptions you wish about background information provided they do not clash with what has been said above and provided you write down your assumptions and produce them with your advice to the Society.

TEACHER'S NOTES ON LE PAPILLON CASE STUDY

A way to use this study is to issue one copy to each participant at least twenty four hours before the first meeting. At the first meeting give opportunity for questions about the meaning of what is written then divide the participants into groups to work out the advice they would give. After at least one hour of discussion, get a reporter from each group to write down his groups conclusions. Collect these and, at a later meeting of all the participants, discuss them.

Here are some points you may like to draw attention to where they are appropriate to the people you are teaching.

- A.
1. Members might have been more loyal if they had bought the lorry with money they had saved by voluntary effort rather than with money from the rehabilitation fund. If they had bought the lorry with their own savings they would not have been so willing to sell it cheap.
 2. There is a need for education of the ordinary members to remind them that the private contractors will only keep their prices low as long as the Co-operative exists. If member disloyalty kills the Co-operative, the contractors will raise their prices.
 3. Education should also concentrate on the fact that charges can only be at their lowest if the lorry is fully used throughout the season.
 4. The Committee might be wrong when they think that raising charges is the best way to increase revenue. It is possible that lowering them will attract so much extra business that revenue rises. (You may want to develop discussion of elasticity of demand here).
 5. The By-Laws probably allow the Co-operative to demand that members make advance contracts with the Society to use its lorry. Point out that such contracts will only, in practice, be enforceable if the number of people who break them is kept small. The Committee must try to keep this number small by education and by swift action against the first people who break them. How can the Committee be educated to be firm in this?
- B.
- It appears that two committee members may be trying to ruin the Society. They are popular so, if no one interferes, they will not be voted out of office. How could the members be educated to see that their own best interests will be served by resisting these two Committee members? Should the Registrar intervene to protect the members from their own democratically-chosen leaders? Would he be justified in using his powers under the Co-operative law to remove the Committee? Should he try to persuade the members to use their powers according to the Co-operative law.
- C.
1. A fair system of allocating times when the lorry is made available to members is clearly needed. Perhaps it shall be done by drawing lots. Perhaps a higher rate should be charged in the popular months. Whatever the system, it is more likely to be acceptable if a plan is drawn up in advance by a system which is known and agreed upon by the members.

C. 2 It may be possible to cut down the mileage for the lorry by careful planning of the order in which it goes from planter to planter. It could be arranged that those who live far from good roads harvest in the driest months. Point out that planning has to be done very far in advance. Ideally each planter would have planted a variety of cane which will be ready for cutting in the month when the lorry will come to him. Is this possible with a perennial crop like Sugar Cane?

D. The question of helping the planters who have very small bits of land or whose land has difficult access presents problems for Co-operatives. It costs the Co-operative more per ton/mile to collect their produce. This can put up average costs for the whole Co-operative and make it easy for a private contractor who collects only from bigger planters, and from those close to good roads, to undercut the Co-operative for this type of work.

Should the Co-operative charge more per ton/mile to collect cane from difficult places? You may point out that there is already discrimination between one member and another in making a charge per ton/mile. The man who is fortunate enough to have land near the sugar factory pays less than the man who has land farther away.

E. 1. Discuss how the Committee might be educated to resist favouritism of this kind and also stop setting the bad example by misusing the lorry themselves.

2. Point out that a log book is essential if the use of the lorry is to be controlled.

3. Can a Co-operative owning one lorry compete effectively with private contractors? The big contractors can spread supervisory costs over several lorries. The small contractors have little need for supervision if the driver is also the owner. The Co-operative usually has to supervise an employed driver and the cost of this supervision has to be carried by the one lorry.

F. Perhaps the Co-operative should make each planter individually responsible for finding labour to cut his cane. The Co-operative must insure itself for employer's liability for anyone it employs.

G. 1. Ways of using the lorry outside the cutting season need to be considered, both in order to spread the fixed costs and in order to keep labour. Any extra work in the intercrop season which covers the extra expenses which it causes and makes some small contribution towards covering fixed costs is worth considering. The Co-operative may have been wrong to reject the work offered by the Government agency. (You may want to develop discussion of marginal costing here).

G. 2. Here are some suggestions for employing the lorry outside the cane cutting season:

(a) Grow vegetables which are harvested in the period January-June.

(b) Carry fertiliser, pesticide or planting material for sugar cane.

This may mean encouraging early planting and it almost certainly means storage of fertiliser. You might discuss whether the Society should store the fertiliser or the individual planters. Could the fertiliser supplier be persuaded to give a discount for fertilisers collected outside the main season?

(c) Could the members use the lorry to bring in building materials in the intercrop season? Would it be useful to encourage members to draw rehabilitation fund money to improve access roads? This could provide out of season work for the lorry and also make transport work within the season easier.

(d) Could the Society do work for Store Societies?

3. Point out the dangers of doing work for people or institutions which are not subject to arbitration before the Registrar.

4. The Co-operative should not be diverted by its pursuit of extra privileges from the Government from its main duty of trying to help itself. It should be estimating whether the extra cost of full licence and insurance will be covered by the extra work brought in.

SPECIMEN CASE STUDY, No. 2

Contributed by the University Center for Co-operatives,
The University of Wisconsin,
Madison, U.S.A.

THE AGRICULTURAL CO-OPERATIVE OF BAMBIA

Assignment:

From the attached report you can obtain a general idea of the situation of this multi-purpose farmers' co-operative and of the role an expatriate adviser played in its operations and development. Make a commentary evaluating this co-operative. (Work in teams of three or four).

The following questions may help you:

1. This report was written by the adviser to give an outside observer a view of the situation and problems he faced. What additional information, if any, should have been included?
2. What does the report indicate about relations within the co-operative?
3. What do you judge to be the relations between the adviser and the co-operative?
4. What indications are there of economic potential for the co-operative, both favourable and unfavourable?
5. Do you agree with the adviser's evaluation of the financial situation? Give reasons.
6. What did you learn from the balance sheet? The profit and loss statement?
7. Given the information you have, if you were acting as adviser, what steps would you take?

The Agricultural Co-operative of Bambia

An Adviser's Report on a Co-operative in Latin America

1. Consumer Store

The treasurer of the Co-operative has taken over the job as storekeeper as of the first of June. Due to his initiative and interest, store sales are steadily rising. For the month of June, sales were almost \$4,000. Overall for the month, we showed a net profit of \$400. In July, we will easily surpass the June sales figures although net profit will not be as well because of added expenses.

We have also opened up a little agricultural food and medicine supply section in the consumer store. We purchased \$2,100 worth of food from a wholesaler and in less than two weeks sold more than \$1,500 worth. The profit margin per bulito (sack) is only \$4.00, but the sale of 40 - 50 bultos monthly supplies a needed source of revenue.

2. Lumber Negotiations

The greater part of my efforts in recent months has been an attempt to put the co-operative into the selling of the lumber of the woodcutters. The only licence to cut wood in the area is in the name of the co-operative. The co-operative could pay a better price for the lumber and could supply a steady source of selling the lumber for the cutters. There would also be a good income for the co-operative.

The old licence was originally placed in the name of the former manager. We had this changed to the co-operative's name and were supposed to sell the lumber for the cutters, thus eliminating the former manager from his private business.

The committee, however, chose an easier path. They simply stated that from this date forward the co-operative would collect 5% of the price of the lumber as a commission. Although this 5% has meant about \$100 monthly in revenue, it decreases the woodcutters' income from his product. In effect, the co-operative has turned out to be another middle-man, lowering the price more and more.

Much of my time was spent in trying to persuade the co-operative to buy the lumber. I prepared a report on the production of lumber and took this to numerous buyers in the city. We could have sold all the lumber at a better price than the cutters make.

At one time, I had arranged for lena (wood) to be sold to a buyer on the spot in Bambia. The buyer for lena offered to give the co-operative an advance for the lumber. The set-up is simple, involves no costs whatsoever, and the only time involved would be spent in paying and marking the lumber. The price which we would receive was \$3.00 more than the price the cutters receive. The manager of the co-operative said no, because he did not want to spend his time marking the lumber.

The initiative for more dealings in the wood business will now depend upon the woodcutters pushing the administration into the buying and selling of lumber.

3. Projected Sawmill

This project I still believe could be profitable. However, with the present situation, when the co-operative refuses to deal with the lumber made by hand with a volume of about \$4,000 monthly, it would be unlikely that the present administration could undertake building a sawmill, much less operating one.

4. Agricultural Projects

There are three families with rabbit projects. The success of these projects has not been good due to sickness and inability of the does to reproduce. The owners of the projects are losing interest. The co-operative now sells rabbit food and medicine in the store.

Among 7 - 8 members of the co-operative there are more than 700 broilers and layers in Bambia. These projects were originally started by FAO but are now carried out individually. I have aided those interested in building cages and houses. The best improvement of the project has been the co-operative selling food from the store. A constant and close supply of food was needed for expansion of the projects. I hope to see in the future more poultry projects.

5. The Co-operative Financially

If asked last October what our biggest problem was, I would have said money. At that time there was \$400 in the bank with which to buy stock and none of the bank loan of \$5,000 had been repaid. At the time of this report, we have completely paid the bank and the stock position is fair. Although we still have inadequate operating capital, we no longer have to worry where the money will come from to pay the bank or buy food supplies. The co-operative itself has worked its way out of the hole and I hope that the members now realise that the co-operative can be profitable.

6. The Outlook

With the termination of the bank loan, we are now in a position to ask for another, if the committee thinks that one is needed. Another loan would be a further burden, but, without it, we can hardly hope to expand into anything more than we already are.

About \$2,000 is needed to continue buying food supplies. Another \$1,000 is needed to expand and build up stock. This is the minimum amount. If they decide to enter into the lumber business, which I doubt, another \$2,000 would be needed. And if they get really ambitious, \$5,000 more could probably be secured for the sawmill.

The easier part of my job has been to set up the bookkeeping system and to improve the administration. Loan money had disappeared and things generally were badly organised. The difficult task, where I have had to carry on alone for the most part, has been in the various projects. First, it was railroad ties and now the lumber they already produce. I feel that perhaps I have been

6. The Outlook - continued

pushing more than they can understand and because of this, the projects have failed. The position now is that the manager and I carry on the minimum of business relations. He is happy with the co-operative as it stands today and my ideas only mean more trouble. In light of this, I will let them go whichever way they want with this lumber business.

COOPERATIVA AGROPECUARIA DE BAMBIA LTDA.

BALANCEAS AT 30 JUNE

ASSETS:

Cash on hand	\$1,194.10
Cash in bank	79.80
Cash in Saving Account No. 776	321.38
Cash in Saving Account No. 929	153.19
Merchandise in Stock	764.03
Accounts Receivable	12.00
	<hr/>
	\$2,524.50

FIXED ASSETS:

The co-operative building	\$8,943.80
Furniture	430.00
	<hr/>
	\$11,898.30
	<hr/> <hr/>

LIABILITIES:

Promissory Note to the Bank	900.00
Accounts Payable	2,538.50
	<hr/>
	3,438.50

CAPITAL:

Donations	800.00
Admission Fees	200.00
Investment on day-work for the Co-op building	3,700.00
Capital paid	2,019.50
Retained profit	1,740.30
	<hr/>
	\$11,898.30
	<hr/>

COOPERATIVA AGROPECUARIA DE BAMBIA LTDA.

BALANCE AS AT 1 SEPTEMBER

ASSETS:

Cash on hand	\$ 118.55
Cash in Bank	115.05
Cash in Saving Account No. 776	181.38
Cash in Saving Account No. 929	419.50
Merchandise in Stock	2,088.37
Accounts Receivable	72.45
	<hr/>
	\$2,995.30

FIXED ASSETS:

The Co-operative building	8,943.80
Furniture	430.00
	<hr/>
	\$ 12,369.10
	<hr/> <hr/>

LIABILITIES:

Accounts payable	2,900.05
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CAPITAL:

Donations	885.60
Admission fees	215.00
Rotary Fund	160.00
Investment on day-work for the Co-op building	3,700.00
Capital paid	2,084.50
Retained profit	2,423.95
	<hr/>
	\$ 12,369.10
	<hr/> <hr/>

COOPERATIVA AGROPECUARIA DE BAMBIA LTDA.

PROFIT AND LOSS

From August 1st to August 31st, 1965

SALES \$6,914.40

COST OF GOODS SOLD:

Inventory on August 1st, 1965	1,951.29	
Purchases	6,174.19	
	8,125.48	
Less Inventory on August 31st 1965	2,088.35	
	6,037.12	6,037.12

GROSS PROFIT 877.28

EXPENSES, SALARIES

Salaries	400.00	
<u>Expenses</u>		
To get new licenses for wood	400.00	
San Jose Typography	70.00	
Miscellaneous	127.40	
		997.40
		(120.12)

MISCELLANEOUS INCOMES

* percentage on commission	115.00	
** administration of food such as milk, flour and wheat	426.00	
		541.00
		\$ 320.00

* the 5% on the lumber

** Government payment for distribution service of controlled commodities.

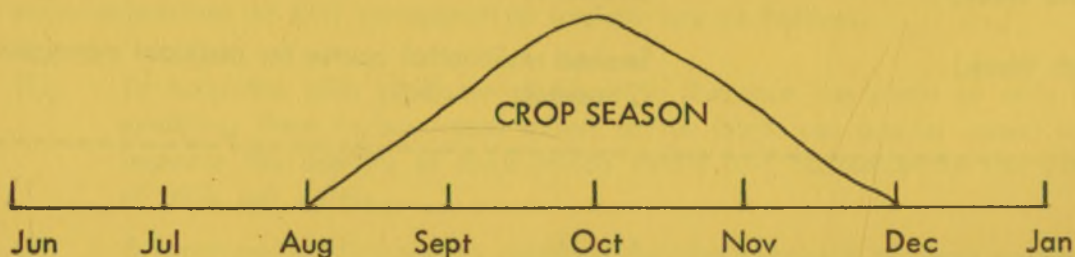
SPECIMEN CASE STUDY. No. 3

COURSE PLANNING

Mr. Opande Shastri was worried. This was the fourth course he had conducted since his appointment as Education Secretary of Melusa Co-operative Union six months before, and like the three earlier courses, this one had failed. That morning his Manager had rebuked him, accusing him of being inefficient and incapable of doing his work properly. He was in danger of being fired.

He had invited 30 committee-members from the societies affiliated to his Union to attend a week-long course he had organised at the local Rural Training Centre, but only nine had turned up at the beginning of the course, and even then, three had left before the course ended. In fact, this last course had a better attendance than the earlier ones. He had had to cancel the first two courses because of poor attendance. For the third one he had eight participants, but again two had left before the course ended. The excuse they gave was always the same; they were too busy.

All societies affiliated to Melusa Co-operative Union were agricultural marketing co-operatives. During the crop season it was customary for committee-members to assist at their societies with the weighing and grading of members' produce. The crop season started in August, rose to a peak in October and started declining so that by the end of December it was over. One could illustrate it as follows:-



Where have I gone wrong? Mr. Shastri wondered. He had made all the necessary arrangements; booked for the training centre; checked that accommodation, meals, classrooms and other facilities were available; invited the participants well in advance; prepared his lesson notes and teaching aids; invited guest lecturers, etc. What more could one have done. What is more, he thought, he had made a comprehensive education programme which had been approved by his education sub-committee. His education plan was as follows:-

JANUARY - MARCH

Preparation of education plans and education sub-committee meetings

APRIL

Preparations for single-day courses for members in the societies

MAY - JULY

Conduct 30 single-day courses for members in the societies

AUGUST	Preparations for committee-members week-long residential courses.
	Preparation for two-week residential courses for managers and assistant managers of primary societies
SEPTEMBER (4th Week)	First committee-members residential course (1 week)
OCTOBER (1st Week)	Second committee-members residential course (1 week)
(2nd Week)	Third committee-members residential course (1 week)
(4th Week)	Fourth committee-members residential course (1 week)
NOVEMBER (1st Week)	First residential course for managers (2 weeks)
(3rd Week)	Second residential course for managers (2 weeks)
DECEMBER (2nd Week)	First residential course for assistant managers (2 weeks)
(4th Week)	Second residential course for assistant managers (2 weeks)

EXERCISE

1. Where did Mr. Shastri go wrong?
2. Draw up a comprehensive one-year plan which would make it possible for committee-members and the staff to attend the course without problems.
3. What are the dangers of organising a course in December (particularly the second half of that month)?

SPECIMEN CASE STUDY, No. 4

DUGDHAGRAM DAIRY CO-OPERATIVE SOCIETY LIMITED

A Study in Management and Finance.

Contributed by: Dr. G.S. Kamat,
Vaikunth Mehta National Institute of Co-operative Management
Poona, India.

This case study of Dugdhagram Dairy Co-operative Society Ltd. presents, apart from the general characteristics and features of the organisation and management of this co-operative, in particular, its financial organisation and position, as revealed by the financial statements and other details collected from the management.

It is intended that the case-study should be discussed in groups to start with and the group reports could then be presented to a general session for further discussion. In the light of the discussion, it is expected that various facets and requirements of financial management would be put forward for clarification of the nature and concepts of financial management of a dairy co-operative.

Introductory

Dugdhagram Dairy Co-operative Society Ltd. was registered in the year 1960 and it started its business in December 1961. Its area of operation is limited to 20 villages within a radius of 12 kilometres from its headquarters at Dugdhagram. The main objectives of this co-operative society are as follows:

- (1) To help the milk producer-members to increase the yield of milk by enabling them to buy more milch cattle (buffaloes and/or cows) and to improve the quality of their milch cattle and consequently the yield of milk per cattle.
- (2) To arrange for finance to members for the purchase of such cattle from the financing agencies - both co-operative and commercial banks.
- (3) To arrange for the sale of milk brought to the Society by their members locally, or outside in the nearby urban areas through the District Co-operative Milk Societies Federation, either to the general consumers or to the Government Milk Scheme.
- (4) To arrange for the supply of necessary inputs like cattle feed, etc. to members.
- (5) To arrange for the medical and other care of milch cattle of members.
- (6) To arrange for transport and storage at the assembling point for milk received from the collection centres, and
- (7) To arrange for the distribution of necessary consumer goods to the members and for undertaking of all allied developmental works for the benefit of members and community within its area.

Membership

When the Society was registered in 1960 it had 43 milk producer-members who were also small agriculturists. In 1974, the membership had gone up to 864. In addition, it had about 1,400 nominal members admitted on payment of Rs.1 as annual nominal membership fee. Thus, in total, this society received milk from 2,264 milk producers in its area of operation. It had covered all the milk producers in its area of operation. However, as the authorised share capital limit of Rs. 100,000 had been reached, the Society was not able to admit the remaining milk producers as 'A' class members. Excepting participation in democratic management of the co-operative, other economic benefits were passed on to nominal members also without any discrimination.

The members of the Society commanded a cattle population of 3,060 buffaloes and 3,136 cows. They collected 6,000 to 8,000 litres of milk per day during the year 1973-1974. There was no other co-operative society collecting milk from the area and the entire milk was supplied to the District Dairy Co-operatives Federation, which arranged to sell it partly to the Government Milk Scheme and partly on its own through its milk booths/centres set up in the local city, to the general public.

The Primary Dairy Co-operative ran 20 collection centres in its area of operation. The milk was collected early morning, once in a day by the Society through its 20 centres for which equal number of staff had been appointed. These centres were provided with the grading equipment by the Society out of its own resources. This equipment was serviced and maintained by the Society regularly.

At the headquarters of the Society, a chilling plant has been set-up with a total capacity of 8,000 litres which belonged to the District Co-operative Federation.

For the purpose of transporting milk from the collection centres, 300 milk carriers were appointed, at the rate of Rs. 3 per day by the Society. In addition, there were three trucks hired by the Society on which Rs.400 per day was spent as hire charges. The entire cost was being borne by the society.

The Society classified members' milk into A, B and C grades. The C grade milk was based on the minimum standard specification approved by the Government with 6 per cent fat and 9 per cent SNF content (buffalo milk) and 3.5 per cent and 8.5 per cent respectively for cow milk. The rate payable for this grade of milk by the government was Rs. 1.90 per litre. For B grade milk which was an improvement over the basic standard specification the rate received by the milk producer was Rs. 1.95 per litre and A grade milk which was described as pure and adulterated milk with maximum fat and SNF content, the rate received by the producer-member was Rs. 2.10 per litre. The policy was to pay 1.5 paise* more per litre for every .1 increase in fat content. Also for .1 increase in SNF (utp. 9.5) 1 ps per litre was paid as bonus by the Federation through the Society to members. The Federation's margin was 22 paise out of which 6 ps were passed into the Society. Broadly, 75 per cent of the milk collected by the Society was of C grade while B was 10 per cent and A was 15 per cent. Grading was normally done once a week. Payments to members were made once in a fortnight after receipt of payment from the Federation at similar intervals. Grading at Federation's level was for pooled milk on co-operatives account.

*A unit of money in India: 100 Paise = R. 1.00

Most of the milk producer-members were small farmers. The milk producers owning cattle between 1 to 4 were 70 per cent, those owning between 5 and 9 were 25 per cent and those above 10 were 5 per cent. There was one member who owned 35 buffaloes and delivered on an average 15,000 litres per year which was the maximum for the years. The next best was a farmer who delivered on an average 9,000 litres per annum. About Rs. 3,000 to 3,500 are provided for prize distribution. It is a practice with the society to award prizes to the member who supplied maximum quantity of milk in a year and the next five below in that order. In addition, 20 prizes are given to members supplying maximum milk at each of the centres every year. Those who have already received one prize during a year are excluded for the purpose of another prize, in which case it is given to the member next in ranking.

Management

The Board of Management of the Co-operative consists of 13 directors. A member supplying milk at least for a period of 7 months in minimum to the Society alone is qualified as a member-candidate for being elected to the Board. There is no separate Managing Committee nor any other sub-committee appointed for the Society.

There were 6 junior officers employed and working at the Head Office - 1 Secretary, 4 Assistant Secretaries (for maintaining cattle feed and other accounts, milk collection records, correspondence, etc) and 1 Public Relations Officer for contacts with the members in particular. In addition, there were 20 persons in charge of 20 milk centres and about 17 labourers. Thus, in all there were 43 employees on the pay role of the society in 1974.

Expenditure on Staff

Year	No.	Rs.	Total Expenditure
1969-70	40	40,995	59,290
1970-71	33	46,274	82,638
1971-72	34	52,670	85,868
1972-73	41	60,780	95,684
1973-74	43	68,314	124,918

45.9 per cent of total expenses)
 34.0 per cent of sales) (1973 - 74)

There is no regular scale of pay for any of the employees and the salary is revised at intervals, and not on a very scientific basis. For example, the Secretary who was drawing Rs. 40/- p.m. in 1960-1961; was being paid Rs. 350/- p.m. in 1974.

The Society received a managerial subsidy from the Government in the initial 3 years on a tapering basis of about Rs. 2,300. Five of the office employees had been trained at the Junior Level Training Centres.

Operations

The following statement will give an idea about the milk collected by the Society in the first year and in the last five years and the amount received for the same. The profit-loss position is also indicated side by side for these years.

Year	Milk in litres delivered	Price received Rs	Profit/loss Position. Rs.
1. 25-12-61 - 30-6-62 (first year)	68,866	45,200.00	Loss
2. 1-7-69 - 30-6-70	15,29,382	15,98,428.00	+ 16,500
3. 1-7-70 - 30-6-71	14,60,006	15,59,145.42	+ 12,30
4. 1-7-71 - 30-6-72	14,65,263	14,50,670.12	- 1,237
5. 1-7-72 - 30-6-73	12,33,678	18,57,832.11	+ 30,322
6. 1-7-73 - 30-6-74	12,70,989	17,93,962.73	+ 23,148

(Financial Year of the Co-operative is from 1st July to 30th June).

Cattle feed was supplied by the Society by taking a margin of 50 paise per bag. It was bought from the State-Agro-Industries Corporation. In the year 1974 the cattle feed (all types) supplied was of the value of Rs. 18,900.

This business gave a net profit to the Society of Rs. 5,137 in 1974. (In the financial statements this was shown under a separate department and profit was carried straight to the Appropriation Account and not to Balance Sheet).

The Society supplied medicines of the value of Rs. 1,500, free of cost to the member milk producers. It has also a stud bull which is hired to the members in case of need for a nominal charge of Rs. 2.

The Society has been arranging for loans to the members for the purchase of milch cattle. Up to 1971 the source of providing milch cattle finance was the Government Dairy Department. The loans were available at $7\frac{1}{2}$ per cent interest for a period of 7 to 9 months. The Society charged two per cent margin.

Since 1971 the Nationalised Banks have come forward. The Central Bank of India and the Bank of Maharashtra were advancing similar loans up to a period of 3 years at 13% interest. Thus each member has to pay 15% interest inclusive of Society's margin on these loans. The maximum loan is Rs. 3,000. A number of members have availed of this loan facilities from time to time and added to their number of milch cattle. Minimum unit of 2 milch cattle is considered essential for making the dairy business viable at the milk producer's level. There has been a perfect linking of milk delivery, collection of payment from the Federation and ultimate adjustment to the milk producers. This has kept the overdues position under control which was reported to be 5 per cent. The payments are made fortnightly and usually after a week from the date of the receipt of the dues from the Federation at similar intervals.

Finances

The important items from the Financial Statements for the year 1973-74 are given below:

STATEMENT - 1

Trading Account

(Rs. in Thousand)			
Debit		Credit	
Item	Rs.	Item	Rs.
Purchase of Milk	17,94	Sale of Milk	19,72
Milk Transport (local area)	62	Transport on Federations	
Stores	4	account	14
Transport on Federations		Miscellaneous	1
account	12		
Road Repairs	5		
Gross Profit	1,10		
	19,87		19,87

STATEMENT - 2

Profit and Loss Account

(Rs. in Thousand)			
Debit		Credit	
Item	Rs.	Item	Rs.
Salaries and Wages	68	Gross Profit	1,10
Bonus to Milk Producers	6	Interest on Loans	7
(@ $\frac{1}{2}$ paise per lit.)		Transport	7
Interest paid to Fed.	1		
Transport charges	18		
Rent	4		
Other Expenses	3		
Depreciation	1		
Net Profit	23		
	1,24		1,24

STATEMENT - 3

Balance Sheet as at 30.6.1974

(Rs. in Thousand)

Capital and Liabilities		Assets	
	Rs.		Rs.
Paid up Capital	97	Cash at Bank	72
Reserve Fund	30	N.S.Certificates:	1
Special Reserve Fund	9	Federation Shares	60
Building Fund	3	Old Loans to be repaid by members	44
Bad debt fund:	3	- Buffaloes	44
Central Bank Loan	4,73	- Cows	8
Risk fund	28	Interest to be received on loans	
Individual Adv.Recd.	16	- Buffaloes	2
Salaries to be paid	5	- Cows	4
Cattle feed dues	15	Central Bank Loans to be repaid by members (New)	4,57
Member Recurring Deposits	25	Dues receiveable from the Federation	34
Dues payable to milk producers	1,26	Advance for construction of 2 bridges on the river	32
Arrears for payment for transport	6	Dead Stock	26
Net Profit	23	Member recurring deposits (on banks)	25
		Dues from the Federation on account of the sale of milk	66
		Member risk fund at bank	28
	8,59		8,59

Notes on the Financial Statements

- (1) Dues of Rs. 33,942 receivable from the District Federation appear to be a disputed amount, between the Society and the Federation and have been repeated continuously for some years in the annual balance sheet of the Society. The dispute was in connection with the lower grading given in the opinion of the Co-operative for the milk supplied by the Society to the Federation.
- (2) Rs. 32,000 were spent out of Co-operative's own funds for the construction of two bridges on the river to facilitate transport of milk during the rainy seasons, from collection centres across the river. The Society owns two launches, which ply in the river and transport the members' milk from the other side of the river to its headquarters.
- (3) The Society has built-up Special Reserve Fund, Education Fund, Bad Debt Fund, Building Fund; on a small basis. The recurring deposits and risk fund are collected from members and invested in banks on their behalf by the Co-operative.
- (4) The society has already repaid the dues on account of old loans received by it under the old Government Scheme for being advanced to the members, for purchase of buffaloes and cows; although Rs. 44,000 and Rs.8,000 are still to be received from the individual members respectively on these accounts by the Co-operative.
- (5) The deposits collected from the members of the order of Rs. 10,000 have since been repaid in response to the demand from the members (1974). Similarly a part of the share capital has also been returned to the members and the maximum share capital an individual member is having now in the society does not exceed Rs. 100 (4 shares). The reason was low dividend rate (6%). There is no State-partnership of the State Government in the Society's share capital.
- (6) The borrowings of the Society from the co-operative or other banks for the purpose of meeting the working capital requirements were nil. These needs were being met out of the advances taken from the Federation against the payment for supply of milk. At times, the well to do members (bigger farmers and milk-producers-cum-trader-members) also advanced loans to overcome the temporary needs of working capital. Interest was paid for such advances to financing members.
- (7) The work of distribution of consumer goods has not been taken up by the Society although the objectives in the bye-laws have made a provision for that. However, arrangements exist for their sale by local suppliers (who are also milk producer-cum-trader members).
- (8) The Society has been given B grade audit classification from the very beginning.

- (9) In the Financial Statements the cattle feed business account, Trading, Profit and Loss Account and Balance Sheet are shown separately. But the profit or loss is taken directly to the final Appropriation Statement rather than to the Financial Statements. The format of the Financial Statements has not been in accordance with the accepted scientific presentation of the Financial Statements of a business organisation following the double-entry book-keeping system. Account heads are vague, in some cases incomplete and hence confusingly repetitive, (e.g. Dues from Federation, without indicating the nature of account).
- (10) The Financial Statements are not accompanied by the Budget for the following year, which is a common practice for Co-operatives.

SPECIMEN CASE STUDY, No. 5

Contributed by the International Co-operative Training Centre
Stanford Hall
Loughborough, U.K.

A VISIT TO SNORALONG

A Case Study on Teaching Method and Advising Teachers

As Co-operative Education Specialist you are visiting the village of Snoralong. You find that a course for committee-men is being run. After their day's work in the fields some 20 of the local farmers have assembled for a two-hour session. It is number three in a series of six sessions on the Role of the Committee. Tonight the subject is The Agenda and Procedure at Meetings. The lecturer, who has been an Instructor for 10 years, gives a very competent and well-informed lecture. There are a few questions which show that at least some of the farmers have some experience of committee work. However, by the half-way interval, at about 9.00 p.m., several of the audience seem to be asleep. You and the lecturer take a brief walk on your own in the cooler outside air during this interval. He asks you what you think of his lecture. What do you say to him?

SPECIMEN CASE STUDY No. 6

Contributed by the International Co-operative Training Centre,
Stanford Hall,
Loughborough, U.K.

CO-OPERATIVE COTTON MARKETING IN ICTSTANIA

1. In ICTSTANIA, the Cotton Marketing Board has the sole right to buy cotton from growers. Government policy is that it should appoint Co-operatives as its buying agents wherever possible. In effect, this means making Co-operatives the only outlet for the main cash crop of many districts.

In order to implement this policy, the Government Co-operative Department were told to aim at creating a Co-operative in every village where cotton is grown. They were fairly successful in this, partly because they could promise that government loans would be available to members of Co-operatives.

2. Leaky Co-operative Union

The Leaky Co-operative Union "united" the ten primary societies in neighbouring cotton growing villages. Seven of these villages are dominated by Hill people and three by Valley people. The Valley people have better land and tend to be richer and better educated. Hill people and Valley people are traditional enemies.

Each primary society sends one delegate to the Union Committee. Thus, at present, it has 7 Hill members and 3 Valley members. In practice, each village usually sends its richest and most powerful citizen to the Union Committee. Committee members usually get the biggest loans.

The Committee chooses its own Chairman and Vice Chairman. Recently, the unwritten arrangement that a Valley man should be Vice-Chairman has broken down and both posts are held by Hill people. The Secretary Manager who was a Valley man was recently sacked and his former deputy, a Hill man, is acting in his place. This state of affairs resulted from the incident of A. Butter's loan.

3. A. Butter's Loan

A. Butter is a traditional leader of the Valley people. When he was Vice-Chairman, he managed to get a very large loan. His own Primary Society recommended it and the Union Committee confirmed it. However, he failed to pay it back in time and he transferred the ownership of his property to his relations so that it was impossible for the Agricultural Loans Agency to recover from him. The Union Committee voted him out of his post as Vice-Chairman but his own village Society were unanimous in re-electing him as their delegate to the Union Committee.

The Union Committee used this pretext to dismiss the Secretary/Manager. There was no evidence that he could have prevented the incident and he certainly gave all proper advice to the Committee before it approved the loan, but it was felt by the majority of the committee that a Valley man could no longer be trusted. The former deputy secretary was a Hill man and the Committee wanted to appoint him as secretary. Such appointments have to be confirmed by the Registrar and he has so far refused confirmation on the grounds that the former deputy is not well enough educated. He would prefer the original secretary to be reappointed. There is deadlock and the Union drifts on without adequate executive leadership.

4. The Union's Present Difficulties

The Union lost a lot of money during the last buying season by incompetent packaging and unpunctual deliveries. This means that the farmers will receive no second payment for their crop. The percentage of overdue loans has become so high that there will be no allocation of funds for new loans in the present growing season. Financial problems are made worse by the fact that the Committee continue to vote themselves excessive allowances and sitting fees.

The Chairman, who has national political ambitions has persuaded the Committee to authorise the signing of contracts to build an assembly hall for public meetings in the main town of the area. There is very little chance that the Union will have funds to make the payments due on these contracts. The Committee has so far refused to investigate the possibility of cancelling the contracts.

As well as being almost bankrupt financially, the Union has also run out of member loyalty. The Hill villagers are not attending meetings. They have so far made no effort to change their representatives on the Union committee. The Valley villagers want to break away and form their own Union. They are very angry because they have been told they won't get a buying licence for cotton if they do. This forced them to remain in the existing Union but there is no knowing what will happen next and a Marketing Board Inspector was recently stoned in a Valley village.

In sum, it looks as if the affairs of the Leaky Co-operative Union may discredit Co-operation in the area for a long time to come.

5. Questions

- (a) What might be done within the framework of present government policy to improve the situation?
- (b) What criticisms would you make of government policy and actions towards Co-operation?

Notes on Case Study No. 6

Section 1

- (a) Can Co-operatives be voluntary if they have a monopoly of a service which the people must use? If not, what effect will this have on the attitude of members?
- (b) Can you "Aim at creating" Co-operatives in every village or must Co-operatives be spontaneous growths? Can a Co-operative which is not "spontaneous" but which is "provoked" into existence by an outsider such as a government official still grow into something to which its members are fully committed?
- (c) What attitude to a Co-operative will its members have if they are first persuaded to join it by the promise of a loan? Would they have joined if they had been told that a Co-operative would help them to help themselves through thrift and joint action?

Section 2

- (a) Is it a good thing that primary societies should be led and represented by the richest and most powerful members? Would you answer differently if we called them "natural leaders" instead of "richest and most powerful"? Should the richer farmers be kept out of the society? If so, how?
- (b) Why do members choose such people? Why in Section 3, does A. Butter get re-elected even after he has been exposed as defrauding the Union? Make practicable suggestions for getting the members represented by honest, capable men who share their problems.
- (c) Why do Committee Members get the biggest loans? Is it because they allocate the money or because they have the best security to offer or for some other reason?

Section 3

- (a) Should the committee have the power to dismiss the Secretary? Will the insecurity prevent capable men from taking the job or prevent the Secretaries from giving the committee good advice which it does not want to hear.

- (b) Will the committee feel and act responsibly if it cannot dismiss and appoint secretaries?
- (c) How could the "deadlock" have been avoided? Would it have been better if EITHER the Registrar OR the Committee had the full right to make the appointment of a new secretary rather than the present divided responsibility?

Section 4

- (a) What action, if any, should the government take when it finds that the Co-operative Organisation to which it has entrusted the collection of one of the nation's main exports is not working effectively? What relevance, if any, has the principle that, "Co-operative Societies are democratic organisations. Their affairs should be administered by persons elected or appointed in a manner agreed by the members and accountable to them" ?
- (b) Do you feel that the Chairman is acting in the best interest of the members when he arranges for the building of the assembly hall as a common service?
- (c) It is possible that the members don't approve of this expenditure. If not, why don't they use their democratic right to prevent it? Why don't they attend meetings?
- (d) Should the Valley villages be allowed to break away and form their own union?

General

- (a) What was the government hoping to achieve when it promoted organisations like the Leaky Co-operative Union?
- (b) What should the members ideally have gained from the Co-operative?
- (c) Would you agree that the Leaky Co-operative Union has, in fact, been used as a weapon in struggles between groups and as a means for the rich villagers to add still more to their wealth? If so, how could this have been prevented?

SPECIMEN CASE STUDY No. 7

KEYO CANE PRODUCTION SOCIETY

Contributed by Mr. Job Mukule
Co-operative College of Kenya,
Langata, Nairobi, Kenya.

Mr. Haron Otieno is a good cane grower but is very much indebted to his society - KEYO. During harvesting season in his efforts to avoid repayments of his debts due to the society he made arrangements to deliver his cane to another factory in names of other members of the other society known as Miwani Cane Production society.

The field recorder discovered this and reported it to the secretary, Keyo society. The secretary took drastic action and wrote to Miwani society to transfer the gross value of an estimated 4 tons cane to Keyo society representing the cane supposed to have been harvested by Mr. Otieno in a particular month. At the end of the month, the Secretary/Manager of MIWANI society transferred the value for $3\frac{1}{2}$ tons cane after establishing that cane actually came from Mr. Otieno's shamba though delivered to Miwani society under the names of Mr. Otieno's relatives who are members of Miwani - Messrs. Opiyo, Onyango and Okech.

The Secretary/Manager, Keyo society on instructions by the committee recovered all money due to the society from Mr. Otieno and furthermore a notice expressing intention to fine him was posted to him. A letter was also sent to Mr. Otieno informing him that the money for his crop delivered by him to Miwani had been transferred to KEYO society.

Mr. Otieno on receiving the letter from his society took it to his advocate. Meanwhile, the relatives, i.e. Messrs. Opiyo, Onyango and Okech through whom Mr. Otieno delivered his cane to Miwani society had refused to accept payments for the cane they delivered and disputed the claim that Mr. Otieno of KEYO society had delivered his cane through them. Mr. Opiyo one of the relatives of Mr. Otieno filed a case against the society for failing to pay him his dues for the crop delivered during that particular month.

1. With reference to the Provision of the Co-operatives societies Act and Rules outline and discuss all relevant sections and Rules involved.
2. Discuss the issue from the point of view of KEYO society and give an appropriate advice.
3. Discuss the issue from the point of view of Miwani and give an appropriate advice.

SPECIMEN CASE STUDY No. 8

POPULARISING ARTIFICIAL INSEMINATION OF CATTLE

Contributed by The International Co-operative Training Centre,
Stanford Hall,
Loughborough, U.K.

Imagine that you are in a country where the women look after the milking cattle.

Their exclusive control of them is an important source of their status in the family and of their personal income. The Dairy Co-operatives, which are controlled by men, are not going to succeed unless the quality of the cattle is raised. The Dairy Co-operative Union has decided to use Artificial Insemination for this purpose. It is essential that the women not only understand what A.I. is, but also bring their cattle forward at the right time to receive it. You have been asked by the Dairy Co-operative Union to produce an outline of a suitable educational programme to achieve this.

4. 3 SPECIMEN IN-TRAY EXERCISES

1. The Deputy Registrar at Meerut.
2. Tatra Consumer Co-operative Society -
Problems of Management.

SPECIMEN IN-TRAY EXERCISE NO. 1

Contributed by The International Co-operative Training Centre,
Stanford Hall,
Loughborough, U.K.

THE DEPUTY REGISTRAR AT MEERUT

Action Required

Read through the letters and write the action you propose to take on the answer sheet. (Please don't mark the letters.) If a letter or memo is required put the full text on the answer sheet. If you would make a note in your diary, record this. You may not have enough time to deal with all the letters so get your priorities right.

Background

You are Deputy Registrar of Co-operatives in Meerut. After being away for four or five days you have come to your office at 10 a.m. on Monday, 1.1.75. You find a number of papers in your in-tray. You have a government vehicle and a telephone. The Assistant Registrars in the various districts also have governmental vehicles and telephones. The telephones are out of order till tomorrow.

Staffing and Geography

Meerut is a division of U.P. state. The state capital is Lucknow, and the Registrar there is your immediate boss. As Deputy Registrar, you are in charge of Meerut division. The staff under you in the Meerut office include a Regional Assistant Registrar of Co-operatives, an Accounts Officer, a Co-operative Officer (Statistics), a Co-operative Officer (Banking), an Office Superintendent and a Driver.

The division is divided into districts. These include Bulandshahr, Sahranpur, Ghaziabad and Dehradun. Each of these is about fifty miles from Meerut. An Assistant Registrar is posted to each district.

Acknowledgements

Most of this exercise was put together by a group from three continents who participated in a course at the I.C.T.C. in education and training for Co-operatives in 1973. Thanks are due to them. They used Indian place names but any further resemblance to India is purely coincidental.

Note

As reproduced here, several different items are included on each page. In practice it is better to use a separate sheet for each item.

1.

Deputy Registrar Co-operative Societies,
Meerut

The servicing of the vehicle has become overdue. Kindly pass the necessary order for servicing.

Signed 1.1.75.
Driver
Deputy Registrar's Office

2.

Deputy Registrar Co-operative Societies,
Meerut

Kindly sanction me casual leave for today.

Signed 1.1.75.
Co-operative Officer (Banking)
Deputy Registrar's Office

3.

IMPORTANT

Deputy Registrar Co-operative Societies
Meerut

The recovery statements as on 15.12.1974. of two districts have not been received. Kindly order:

1. Saharanpur
2. Meerut

Signed
Co-operative Officer (Statistics)
1.1.75.

4.

URGENT

Deputy Registrar Co-operative Societies,
Meerut

The Commissioner has called an urgent meeting at his residence on 2.1.75. at 10.00 a.m. to review the progress of the Rabi Campaign. The Accounts Officer has been informed about this and he is preparing the file.

Signed 31.12.74.
Office Superintendent
Deputy Registrar's Office

5.

IMMEDIATE

Office of Registrar
Co-operative Societies
Lucknow, U.P.

29.12.1974.

Deputy Registrar Co-operative Societies,
Meerut,
U.P.

You are required to see me on 3.1.75. at 10.00 a.m. in my office on the following matters.

1. Action to be taken against District Co-op. Bank, Saharanpur.
2. Recovery position.
3. Excess and Savings Statement.

Signed
Registrar Co-op. Societies
Lucknow.

6.

Deputy Registrar Co-operative Societies,
Meerut

Kindly approve my tour programme as given below:

- | | | |
|---------|-------------|--|
| 2.1.75. | Bulandshahr | Inspection of Loan and subsidy recovery. |
| 4.1.75. | Hapur | - do - |
| 5.1.75. | Ghaziasad | - do - |

Signed
Accounts Officer
Deputy Registrar's Office

31.12.74.

7.

IMPORTANT

Office of Asst. Registrar
Co-operative Societies,
Deharadun.

29.12.1974.

Deputy Registrar Co-operative Societies,
Meerut

The Vehicle attached to the undersigned is not giving adequate petrol and mobile oil average, and requires re-boring.

Please approve necessary work.

Signed
District Asst. Registrar
Deharadun.

8.

CONFIDENTIAL

To:
The Deputy Registrar of Co-operative Societies,
Meerut (U.P.)

The Secretary of the Co-operative Marketing Society, Ghaziasad, has informed me that the cashier, Shiri L.P. Lal, has committed an embezzlement of Rs. 500/=. Efforts are being made to recover the money in question, but his whereabouts are not known. I am deputing the Co-operative Officer (Marketing) to enquire into the matter and report to me.

Submitted for your information and necessary action please.

Dist. Ass. Registrar
Co-op Societies,
Meerut.

Date: 30.12.74.

9.

30.12.74.

Deputy Registrar of Co-operative Societies,
Meerut.

The charge sheet was served on the members of the Board (under suspension) of directors of Central Co-op. Consumers Store, Meerut. Their replies have been received. The date of hearing is to be fixed before passing the final orders. Kindly fix some date convenient to you so that they may be informed and may come over here to explain their position.

Signed
Regional Ass. Registrar
Deputy Registrar Co-operative
Societies Office

10.

IMPORTANT

Deputy Registrar,
Meerut

You are hereby informed that one Co-operative Inspector of this district recently promoted to the post of Co-operative Officer has already been relieved. Kindly make necessary arrangement for his replacement so that the work may not suffer for long.

Signed
A. R. Saharunpur
30.12.74.

83.

11.

Tour Programme of Minister for Co-operation U.P.
Government, Lucknow, to review the Rabi Campaign

5.1.75. Arrival Dehradun 7.00 a.m. by Doon Express

5.1.75. Departure Dehradun 10.00 p.m. - do -

Signed 31.12.74.
Private Secretary to
Minister of Co-operation,
U.P. Government,
Council House, Lucknow.

To: Deputy Registrar Co-operative Societies
Meerut

12.

Deputy Registrar
Meerut

The Annual General Meeting of the Co-op. Marketing Society Ponlaud Shahr is going to be held on 1.1.75. at 10.45 a.m. You are requested to attend the same.

Signed
Secretary
Co-op. Marketing Society
Ponlaud Shahr

13.

CO-OPERATIVE HOSPITAL SOCIETY LTD. LX27
12 Station Road, Meerut

Date: 31st December 1974.

Chairman: Dr. S.P. Lal
Tel: 82746

To: Deputy Registrar Co-operative Societies
Meerut

Dear Sir,

I wish to inform you that the Public Works Department Minister, U.P. Government has kindly agreed to inaugurate the new Co-operative Hospital building at Meerut on 3rd January 1975 at 3.00 p.m. On behalf of the Committee of the society, I extend my invitation to attend the function.

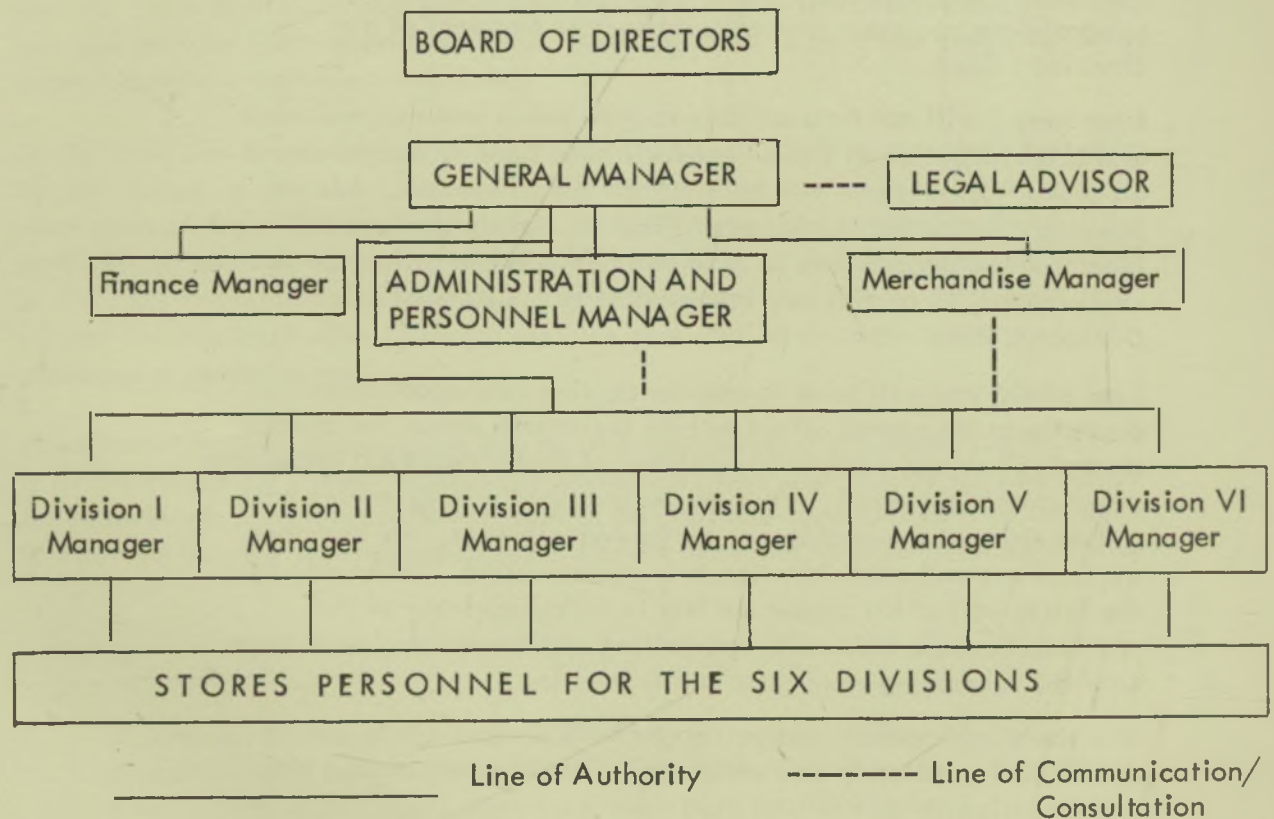
Yours sincerely,

Chairman

SPECIMEN IN-TRAY EXERCISE No. 2

TATRA CONSUMER CO-OPERATIVE SOCIETY

The Tatra Consumer Co-operative Society was formed six years ago in one of the large towns of the country. Over the years the society has developed steadily, adding five more stores to the original one. The stores are located in different parts of the town, each one headed by a Divisional Manager. The organisational chart of the Society is drawn below:



The Manager of Division I Store has suddenly died and you have been appointed by the General Manager to succeed him. This is, in fact, the kind of promotion you have been longing for, having served in various capacities in Division II Store: first as a sales assistant, then as a Stores and Materials Officer, Administrative Officer and, of late, a Finance Officer. Although you are not quite familiar with what has been going on in Division I, you are none the less confident that you can manage the Store satisfactorily - what with all the experience you have gained after all these years in Division II Store. Moreover, the operation policy of all the stores is uniform.

This notice came suddenly and quite unexpectedly. You were given only three days in which to wind up and hand over your work in Division II and then proceed immediately to the head office for some briefing before commencing work in Division I.

It is Monday morning, the 20th May, when you walk into the head office to meet the manager and some departmental heads for briefing before taking up the new job in Division I.

On arriving at the head office you find that the General Manager has been called suddenly to attend some important meeting. He has, however, left the following letter with his secretary, and has also, according to the secretary, instructed all departmental heads to give you any information you might require. The letter from the General Manager reads:

To: Mr. Pachik

From: The General Manager

Further to our telephone conversation last week, I would like to congratulate you upon your appointment as Manager of our Division I Store.

I am sorry I will not be available to give you a personal welcome and brief induction as I had hoped. I have been called to attend an urgent meeting and will be away for the whole day. I have, however, instructed the heads of Finance, Administration and Merchandise Departments to give you any possible assistance you may require, in particular, information on the state of affairs in Division I Store.

I am afraid you will have to commence your new appointment promptly as we cannot afford to miss the season which has already started. You will find quite a number of things requiring immediate attention at Division I. Your predecessor had a long service with us and enjoyed the confidence of the Management. He managed the business and administration to our satisfaction. However, in the latter part of his career we had to follow up many of the problems because his health was failing and he was unable to cope with the increasing work-load in his Division.

It is therefore evident that you might have some old problems to deal with immediately and which may demand much of your time and attention.

I am sure, none the less, that you are capable of handling these problems, and we at the head office shall spare no efforts to render any possible assistance to you during the initial, and apparently, tedious period of settling in your new job. Do not hesitate to consult me should you come against any problems.

On behalf of the board and members of staff, I welcome you to your new job and wish you all the best.

After reading the General Manager's letter you are full of spirit and you proceed to meet the Personnel and Administrative Manager from whom you learn a bit more about Division I Store. According to him, the staff in Division I comprises the Division Manager (yourself), an Administrative Officer, a Finance Officer, a Stores and Merchandise Officer, six heads of sales departments, 34 sales assistants, 10 clerical staff and four labourers.

He also points out that the Store has been in the habit of employing casual labour much against advice to the contrary from head office. This Manager goes on complaining about other administrative matters in Division I some of which are to do with overtime, negligence of duty among some of the employees, trouble with the police concerning obstruction of traffic, and about records not being kept up-to-date. You take notes of all these and promise to look into the matter immediately. You are a bit discouraged by the Manager's attitude and it is your impression that he is a bit cynical.

The meeting with the Finance and the Merchandise Managers was long but very useful. From them you have learnt that the store is in a sound economic situation and was doing a fairly good business. There appeared to be a few problems but you expect to attend to these immediately.

By the time you are through with the head office staff, it is four o'clock and you decide to rush to Division I Store which is at the other end of town. You want to meet some of the staff before they close at 5.00 p.m. You are aware that all the staff will be away tomorrow as it is a public holiday. It is 5.15 when you arrive at the store having been caught up in the traffic, and you find everyone has left except the Administrative Officer (who has been acting manager since your predecessor passed away.)

The Administrative Officer gives you all the store keys, and informs you that he is to commence his annual leave on Thursday 23rd May and that he will be away for three weeks. He also tells you that he had not had time to attend to the work left behind by your predecessor because he had to attend to other pressing matters.

Exercise

1. Having gone through the mail in the in-tray, and following the discussions you had at the head office and later with the Administrative Manager, draw up a work plan for the coming month (in order of priority).
2. Attend to the correspondence in the in-tray and take action accordingly, giving justification for each action you take.

(1)

MEMORANDUM

From: Finance Officer

14th May, 1974.

To: Manager, Division I Store

We have received the enclosed invoice from Prakash Wholesalers Ltd. in respect of goods supplied to us and I will be grateful if you could approve it before payment is made.

Enclosure

INVOICE

Dr. to PRAKASH WHOLESALERS LIMITED

4th May, 1974.

To Supply of the following goods as per our Delivery Note No. 6458 -
vide your order No. 072146 of 27th April, 1974.

40 x 200 lb. bags Rice @ Rs. 150 - per bag	Rs. 6000 -
20 doz. Eggs @ Rs. 6 - per doz.	Rs. 120 -
60 bags Fine Wheat Flour @ Rs. 5 - per bag	Rs. 350 -
30 tins Sunflower Oil @ Rs. 25 - per tin	Rs. 750 -
30 x 48 cartons Canned Fish @ Rs. 18 a carton	Rs. 540 -
	<u>Rs. 6870 -</u>

(2)

MEMORANDUM

From: The Personnel Manager

10th May, 1974.

To: Divisional Manager
Store I

On checking your Financial Returns for the last two weeks of April we have found the following discrepancies:

1. Payment of Rs. 150 paid to T.N.B. Transport is not supported by any invoice or receipt.
2. Cash receipts for the period 21/4-29/4 were not deposited to the bank until 30/4/74. You are no doubt aware of the danger of keeping large sums of money in the store and our policy that cash receipts should be deposited to the bank on the same day.
3. A Mr. K. Joshi was paid the sum of Rs. 15 for "services rendered". We would like to have full details of this transaction, substantiated by a receipt or a payment voucher signed by the payee.

We would appreciate to have your explanation for these queries together with the missing documents mentioned above as soon as possible before the discrepancies are brought to the notice of the auditors.

(3)

MEMORANDUM

From: The Personnel Manager
Personnel Department

10th May 1974.

To: Manager - Division I Store

Will you please send us a list of employees who qualify for double increments for the year ending 30th June 1974. You are required to make a comment on the performance of each employee recommended, and any other personal reports which you would like the General Manager to consider. Your list should reach the Personnel Department not later than 31st May 1974.

(4)

The Divisional Manager
Tatra Co-operative Society
Division 1

7th May 1974

Sir,

You may not be aware, but I have noticed on many occasions when you are not around that the Cashier is always running about with one of the young ladies in the store, leaving customers unattended. This has often upset customers, and I fear that if your Cashier is not sternly reprimanded members will lose complete faith in our Cooperative.

As a member loyal to my Society, I am bringing this matter to your attention in good faith trusting that you will take proper measures before further damage is made to the reputation of our Society.

Well-wisher

(5)

MEMORANDUM

To: All Divisional Managers

4th May 1974.

From: The General Manager

The Government has approached us with a request to help with the distribution of commodities in short supply - in particular kerosene and hydrogenated oils.

The Board agreed to this request and has decided that we sell the two commodities in our operating Divisions.

I am aware that these commodities are very scarce and that the possibility of a public scramble for them - sometimes leading to confusion and disgruntlement - may arise if proper and careful management is not exercised. In view of this it might be necessary to ration these commodities where it is felt that stocks do not adequately meet public demand.

You are therefore required to plan distribution of these commodities. I trust that with the help of your experienced sales staff you will manage to handle this new line of merchandise efficiently and give satisfactory service to the public.

(6)

INTERNAL MEMORANDUM

To: Manager, Division I Store

2nd May 1974

From: Mary de Souza (Sales Clerk)

My marriage has been set for the 30th May and I would be grateful if you would grant me my annual leave from the 22nd May to 4th June - both dates inclusive.

I am aware that I only joined the Society eight months ago and as such I don't qualify for a leave, but I trust that you will treat this as a special case.

(7)

INTERNAL MEMORANDUM

To: Manager, Division I Store

2nd May 1974

From: K. Man (Sales Clerk)

Sir,

I have been employed in this Division for the last five years, and in order to develop my career opportunities I intend to join the Tatra Commercial College as a part-time student. I would like to join in the new term starting on the 10th June and ending on the 15th December. On completion of the course I will be awarded a Higher Certificate in Retail Salesmanship.

I would therefore be grateful if you will kindly grant me permission to join the classes every Monday, Wednesday and Friday morning from 8.00 a.m. to 12.30 p.m.

I will be available for work in the afternoons on these three days and if necessary I am prepared to work overtime without pay to make up for the hours lost.

(8)

INTERNAL MEMORANDUM

To: Manager, Division I Store

28th April, 1974.

From: U.N.D. Kutty (Stores and
Materials Officer)

I am writing to seek your approval for my annual leave. I intend to go on holiday from the 15th June to 6th July, both dates inclusive.

I will appreciate it if you will kindly give me advance intimation so that I can make the necessary arrangements for travel. I look forward to an early reply, as you know the difficulties experienced when making reservations and bookings for travel during the vacation season.

(9)

Divisional Manager,

25th April, 1974.

We the following employees of your Store would respectfully like to submit to you that we have observed recently that overtime in our Store has not been distributed on the fair and right basis by the Officer who deals with the matter.

His favourite people get overtime every week. But we hardly get a chance in 6 months. For obvious fear of victimisation we prefer to remain anonymous. But we sincerely hope that you will look into the matter and improve the situation. Otherwise we will be forced to go to the union.

(10)

INTERNAL MEMORANDUM

24th April 1974

To: Manager, Division I Store

From: O.P. Raman (Junior Officer,
Foods Department)

I am writing to seek your approval for my annual leave. I intend to go on holiday from the 15th May to 10th June 1974, both dates inclusive.

I have orally explained to you the purpose of my leave and I will be grateful if you will kindly give me advance salary due to me for the month of May as I will need the money during my vacation.

I shall be grateful if you will intimate to me at your earliest convenience so that I can make the necessary reservations for my leave travel and other arrangements.

(11)

INTERNAL MEMORANDUM

20th April, 1974.

To: Manager, Division I Store

From: I.I. Johnson (Junior Officer,
Households Department)

I want to remind you that I have worked overtime on 2 holidays in the month of March 1974 for the stocktaking. I was assured that overtime would be paid to me for these two days but so far I have not received any payment.

I have sent you two reminders for this claim without getting any reply. If I do not get any positive response from you I will be compelled to take up this issue with the Union.

(12)

15th April, 1974.

The Manager Division I Store
Tatra Consumer Co-operative Society

Our constable on duty has frequently observed that very often trucks and delivery vans are parked in front of your stores for a long time, causing considerable obstruction to traffic.

Obstructing the traffic is an offence which is punishable under the law. We are giving you a period of four weeks in which to find a proper place to park your vehicles without disturbing the traffic.

If you fail to comply with this instruction we shall have no alternative but to file legal proceedings against you in a court of law.

Signed
Officer-in-Charge
TRAFFIC POLICE

(13)

MEMORANDUM

15th April, 1974.

To: Manager, Division I Store
From: Merchandise Manager
Copy to: General Manager
Finance Manager

I have reviewed the Stock Records given to me after the Annual Stocktaking. I found many discrepancies when the stock figures were compared to the bin-cards maintained by your Stores Officer. I will appreciate it if you will undertake investigations and prepare an explanatory note. I would like to discuss this in the middle of May so that we can submit the closing stock statements to the Accounts for preparation of the final report.

I am forwarding a copy of this letter to the Finance Manager as he is very keen that proper value of the closing stock should be made available to him by the end of May to facilitate preparation of the annual report. As you are aware, this is a legal requirement and we must comply with the same.

(14)

INTERNAL MEMORANDUM

15th April, 1974.

To: Manager, Division I Store

From: O.P. Raman (Clerk)

I have been working with your Society for the last 15 years. My house is in a very bad condition and I have received a notice from the local Municipal Authority that I must undertake prompt repairs or else the house will be demolished by the Municipality as it is a danger to the inhabitants as well as to the neighbours

I am anxious to undertake the repairs prior to the monsoons in July 1974. It is estimated that the cost of repairs would be about Rs 2,000/- and I am only able to raise about Rs 1,000/-. I request your Society to grant me a loan of Rs. 1,000/- to enable me to carry out the repairs

I shall be grateful if you will kindly sanction this loan application at your earliest convenience. Should this meet with your approval I shall be ready to repay the loan within a period of forty months at monthly instalments of Rs. 25/- deducted from my salary.

Thanking you,

Yours faithfully,

O.P. Raman.

Secretary's note: Reminder received 5th May.

The employee wants to meet you personally to explain the emergency and the need for the loan.

(15)

INTERNAL MEMORANDUM

15th April, 1974.

To: Manager, Division I Store

From: The Personnel Manager,
Personnel Department.

Our review of the first quarter of the reporting time of employees shows that employees in your Division do not report for work on time. This trend is not very healthy for efficiency of the Society and I seek your cooperation in maintaining punctuality in your Division. I would like to draw your attention to the following employees whose time-keeping record is very poor. I will appreciate it if you will take immediate steps to reprimand them. Please let me know what action you have taken so that I may file the same in their Personnel folders. The employees concerned are:

A. I. Wilson	F. Nelson
Mary D'Souza	O.P. Raman
N. Stone	O.M. Ted
Z. Marker	

(16)
MEMORANDUM

10th April, 1974

To: Manager, Division I Store

From: The Personnel Manager,
Personnel Department

We have found from past experience that there is a rush of applications for Privilege Leave in the month of June. We are unable to approve leave to all the applicants as high absenteeism will affect our operations.

I would like you to discuss with your employees and prepare a Privilege Leave schedule so that your operations may not suffer and at the same time we may not have to employ temporary people or increase our overtime vote.

The General Manager has advised us to collect the Privilege Leave schedules by 15th May 1974.

(17)
MEMORANDUM

8th April, 1974.

To: Manager Division I Store

From: The Finance Manager

Copy to: The General Manager

The Financial Operation Report of your Division is not very encouraging. The operation cost has gone up by about 15%. This is the highest increase of all our operating divisions. Correspondingly, your sales for the first quarter are the lowest.

We have observed that we do not get regular reports regarding the net sales and the stock statements. In the past we have often drawn your attention to this fact, but have not yet found any improvement.

I am forwarding a copy of this letter to the General Manager for his information and would like you to take appropriate action to improve operating efficiency.

(18)

INTERNAL MEMORANDUM

6th April 1974

To: Manager, Division I Store

From: O.P. Raman (Clerk)

I understand that the Society is contemplating opening a new store in my area. I have been working with your Society for the last 5 years and have rendered good service. My personal knowledge of the area, contact with the local people and familiarity with the operations of the Society will help me to render valuable service in the new Store. It will also be convenient to me as I will be working close to my home.

I shall, therefore, feel obliged if you will forward my application with your recommendation for my transfer to the new store.

Thanking you.

Secretary's note: 1st Reminder 30th April
2nd Reminder 15th May

This employee wants to have a personal meeting with you as it is announced that the new store will start functioning before the 1st July 1974.

(19)

INTERNAL MEMORANDUM

5th April, 1974.

To: Manager, Division I Store

We the undersigned employees beg to submit the following request for your kind consideration and immediate action.

In view of the rising prices and our limited salaries paid by the Society, we are unable to spend any money and celebrate the national festivals.

You are aware that most of the good employers pay festival advance to their employees so that they can participate and share the happiness of the occasion.

We shall, therefore, be grateful if you will kindly consider this request and grant us an advance, before the next festival which will be celebrated on 25th May 1974. This advance may be recovered from our monthly salary in 3 equal instalments.

R. John
U.N. Noyyor
S.D. Smith
Mary D'Souza

H. Edward
A.I. Wilson
Miss Mabel
O.P. Raman

We are giving this Memorandum on behalf of all employees.

(20)

MEMORANDUM

3rd April 1974

To: Manager, Division I Store

From: The General Manager.

It has been brought to my notice that some of the operating departments hire temporary labour on their own without my approval. The Accounts Department has referred to me four such cases where you have hired temporary labour in the first quarter of the year 1974. I would like your explanation as to why the above temporary labour was hired as I do not consider this good practice.

(21)

MEMORANDUM

3rd April, 1974

To: Manager, Division I Store

From: The General Manager

The Personnel Department has sought my approval for the overtime worked by employees of your Division for the first quarter of 1974. There is a clear indication that overtime has increased considerably during the past year.

Increase in overtime could only be justified by (a) a relative increase in sales, and/or (b) inadequate personnel. As it happens, there has not been an increase in turnover to warrant the demand for extra man-hours. I am also aware that your division is adequately staffed and consequently the need for overtime should not arise so often.

I would like to stress that efforts must be made to cut down this expense and I would ask you to suggest ways in which this could be done without affecting efficiency in the performance of your Division.

I am approving payment for the January - March overtime on the understanding that claims of this magnitude will not be entertained in the future.

(22)

MEMORANDUM

March 27th, 1974.

To: Manager, Division I Store

From: Merchandise Manager.

I have found from past experience that you notify the requirement for seasonal goods very late, and as a result we are unable to procure adequate and quality material at a competitive price. I will appreciate it if I have advance information regarding your consumption patterns and delivery schedule for the seasonal goods. I would like you to review your monsoon protection requirements and submit to me the quality and quantity required by you not later than April 30th. I plan to negotiate the supply during 2nd week of May so that we can get delivery by the end of May.

(23)

MEMORANDUM

15th March, 1974.

To: Manager, Division I Store

From: The General Manager

I refer to the Auditor's Report dated 2nd March 1974 and some of the irregularities that have been noticed in your Division. I want to ensure that such critical remarks of the Government Auditor are properly investigated and satisfactory explanations given, so that wrong impressions are not created. I want you to take immediate steps to investigate and make a factual report to me so that I can call a meeting with the Government Auditors.

(24)

MEMORANDUM

10th March 1974

To: The Personnel Manager
u.f.s. Manager, Division I Store

From: I.A. Wilson, (Cashier, Division I Store)

I would like to submit my application for the post of Finance Officer in the new store which is to be opened by our Society at Salpindi in August.

I have been working with this store for the past four years but have not been considered for any promotion. Two years ago the Society opened a new store where opportunities of promotion to higher responsibilities were available, but when I applied for a transfer to the new store my application was turned down.

I hope this time you will give my request a favourable consideration.

(25)

5th March 1974

Dear Sir,

I am a shareholder of your Society and a regular patron. I regret to inform you that although in the last few years of my membership I have never had any occasion to complain against the services of your Society, in recent months I have found that the efficiency is going down gradually and the consumers are not given adequate attention and service as expected from your employees. In particular, I would like to draw your attention to an incident which took place near the Cashier's counter a few days ago.

There was a long queue of customers waiting to pay for their purchases but there was no cashier to attend to them. After a long wait the members became impatient and annoyed at not being served. A commotion ensued, forcing the management to make some temporary arrangements to serve the customers.

I am sure you will take prompt steps to ensure that this practice is not repeated in future as it might undermine the faith of members in their Society.

Yours truly,
H. Hendesson

c.c. General Manager

Consumers' Co-operative Societies.

(26)

MEMORANDUM

2nd March 1974

To: Manager, Division I Store

From: The General Manager

I would like you to take prompt action to plan for increasing your stocks and the available space for monsoon umbrellas and school books, as we have been asked by the Government to extend our cooperation in selling these commodities so as to prevent profiteering by private dealers.

The Government is going to take steps to increase our allotment and I will appreciate it if you will kindly let me know within one month your maximum requirements so that I can make the necessary arrangements when the quota is received.

(27)

MEMORANDUM

1st March 1974.

To: Manager, Division I Store

From: The General Manager

Consistent with the resolution of the Board to encourage other Co-operative Societies and to assist them in their retail distribution, we plan to sell fruits and vegetables supplied to us by some of the Farmers' Co-operatives.

We propose to introduce this with effect from 1st July. Please submit to us your plans regarding the space allotment and the quantity required by you by the second week of May.

(28)

MEMORANDUM

18th February, 1974.

To: Manager, Division I Store

From: The Personnel Department

While going through the Notice issued to us under the Shops and Establishments Act by the Government Inspector who visited your Division on 15th January 1974, I find that some of the provisions of the Shops Act have not been properly complied with by your Division. It also appears that some of the records are not kept up to date as prescribed by the Rules. You are required to take prompt action in this respect as he has threatened legal proceedings in case this is not complied with within one month from the date of the Notice.

It will be appreciated if you take prompt action and make a report to the Inspector with a copy to us for our records.

Secretary's note: 1st reminder received 1st March 1974

2nd reminder received 15th March 1974

As per the letter dated 3rd May issued by the Government informing the Division why legal proceedings should not be taken against the Society, this was referred to the legal Department for necessary action.

The Personnel Department wants to comply with the provisions of the law and save the trouble of prosecution.

(29)

MEMORANDUM

15th January 1974

To: Manager, Division I Store

From: The General Manager

In the meeting of the Board of Directors held on 5th February 1974 it was resolved that all the operating divisions should formulate their plans to improve sales turnover and achieve optimum utilisation of space and money available to all the operating divisions.

You are therefore required to prepare your next year's plan and give us suggestions as to how the turnover of your division could be improved. In case you would like to make any change in the space allotment to different departments or to modify the existing layout, you are free to make your suggestions in this report.

Once again, I want to stress that the Board hopes that the Divisional Managers will take prompt steps to render more effective and efficient services to our valued clients and customers.

Your report should be available to us by the end of May so that we can compile a consolidated report to be placed at the Board Meeting to be held in June for this purpose.

(30)

MEMORANDUM

1st January, 1974

To: Manager, Division I Store

From: The Personnel Manager
Personnel Department

You are aware that according to our company policy we are required to maintain a list of promotable employees in our organisation. A promotable employee is one who makes an outstanding contribution and has potential to assume additional responsibilities over a period. The Personnel Department can help develop such employees. We are enclosing herewith the necessary forms which you are required to complete and return to the Personnel Department on or before 30.1.1974. Should you require any assistance in completing this form you can refer the matter to the undersigned.

(31)

1st January, 1974.

The Manager,
Division I Store.

Dear Sir,

I would like to apply for temporary employment during the mid-year vacations.

I am a third year Commerce student at Talva University. I have had some experience of Co-operative stores, having worked for two years as Assistant Stores and Merchandise Officer at Shalimar Co-operative Store before joining the University.

If my application is accepted, I will be available from the 10th June to 10th July 1974.

I will accept any job you are prepared to offer me, but if possible, I would appreciate if I were placed in your stores as this would help me with my final thesis on 'Store Management in Commercial Enterprises'.

I hope you will give my application your favourable consideration.

Yours faithfully,

(signed) DAMAN SHASTRI

(32)

1st January, 1974.

The Manager,
Division I Store.

Dear Sir,

I would like to apply for a temporary job in your store during the Mid-Year Vacations.

I am a second year student at the Talva College of Commerce. I have not had any previous experience of working in a Co-operative store, but it is my ambition to join one when I finish my training.

Should my application be considered, I will be available from the 20th May to 10th June.

Yours sincerely,

(signed) ROSALIND DE SOUZA

4.4 SPECIMEN ROLE PLAY EXERCISES

1. Labumba Co-operative Rice Mill.
2. Movealong Multipurpose Co-operative Society.
3. NSO Credit Union - A Problem of Apathy.
4. A Group Dynamics Exercise in Procedure at Meetings.

SPECIMEN ROLE PLAY EXERCISE No. 1

LABUMBA: CO-OPERATIVE RICE MILL

Contributed by: The University Center for Co-operatives
University of Wisconsin,
Madison, U.S.A.

DESCRIPTION OF THE SITUATION

The Labumba Co-operative Society owns a rice mill. It is not running well. The Manager does not understand why the mill is having difficulty. Only two months ago, he hired a new Supervisor for the mill. The Supervisor is a young, well-educated man, who worked in another co-operative before coming to the rice mill. He knows the most modern techniques, yet the production in the mill is down. The employees are careless, and they watch the clock, anxious to leave the minute the work day is over.

The new Supervisor replaced an older man, the first employee of the co-operative, who still works in the mill.

One day, an employee is caught smoking in the mill, which is very dangerous, and a violation of the working rules. The employee is the son of one of the older members of the co-operative. The new Supervisor fires the employee caught smoking, without consulting the Manager. The employee complains about the co-operative. The President of the co-operative hears about the incident, and without consulting the Manager, calls a meeting of the board to "get to the bottom of the trouble".

In preparation for that board meeting, the President also calls a meeting of:

The Manager
The Supervisor
The young man caught smoking

This is the meeting you are going to participate in, taking one of the roles listed above.

You will be given a description of the character of the person whose role you are to play. Read it carefully before the session. Please do not discuss the character you are to personify with others in the group.

After the role play we will discuss the action, to help us understand dealing with similar human situations in real life.

DESCRIPTION OF THE MANAGER

If the President of this co-operative would only let you run the business you would get along fine.

You are an experienced manager, who was hired about five years ago when the co-operative got too big for the directors to run with one employee, the old man who was a supervisor at the mill.

You are the peace-maker type. You have arguments and disagreements, and your natural reaction is to be slow in taking action.

You waited a long time before replacing the old supervisor in the mill. Finally, you had to put in a young, efficient supervisor who knew modern methods. But you kept the old man on as a worker in the mill. All the employees liked the old man, and so did you, but production has to go up or the co-operative will fail.

You are not pleased with the new supervisor firing the young employee for smoking in the mill, without at least telling you about it, but you are going to back him up, as he has to have authority over the workers.

A lot of people think you move too slowly in making decisions, but you feel if people would only let you do your job, your methods of getting all sides of the story first, before making a decision, would pay off.

The President of the co-operative is hard to put up with, but you can understand his way of thinking, and you are tolerant of him.

However, in this case you are caught in the middle.

DESCRIPTION OF THE NEW SUPERVISOR

You were hired to come in and put the rice mill on a profitable basis.

This is not an easy job since the place was run in a pretty careless manner by the old man who had the job before you. Everybody liked him and of course he was easy to work for, since he required nothing of the employees. He is still in the mill, and that is pretty hard for you to put up with, as the employees treat him as if he were still in charge of the mill.

You are young and impatient for results. You try to be fair, but it is difficult to get these uneducated village people to understand what you are trying to do. When you tell them what to do, they pretend they didn't hear you, or that they don't understand. Or they say "yes" but they do as they please. However, you will stay at the mill at least until the production goes up. If you can raise the production, you will have a good reputation and can get a better job somewhere else.

You have to be polite to the President of the Co-operative because it is obvious he has the authority, not the Manager.

You like the Manager and respect him, but you wish he were more aggressive. At least the Manager let you run your own show.

Too bad these local people don't appreciate how much you are doing for them.

You are the boss in the mill, and so you make the rules. No need for the employees to "discuss them". You put the rules in writing and expect them to be followed to the letter.

PRESIDENT

As President you feel responsible for everything that happens at the co-operative. You have no business experience, but you are a long-time member of the co-operative, and one of the oldest farmers in the area. You hear all the gossip in the village, and you know everyone in the area. You are easily upset by little things, and you worry a lot about how the co-operative is run on a day-to-day basis. Every detail is important to you.

You trust the Manager, but you have no understanding of the need to delegate authority.

You did not approve of hiring a new supervisor. After all, the old supervisor had been working at the mill for years, and is a good, loyal man, even if he does not have much ability.

Of course, you know the father of the boy caught smoking, and the boy too. They come from a good family, and are faithful members of the co-operative, and that must be considered.

Everything that happens at the co-operative is bound to reflect on your personal reputation. Your prestige is at stake. The members elected you to look after their interests, and you intend to do it.

As the co-operative has grown larger, you have a heavy responsibility, People just don't understand the many details you have to look after now . . .

DESCRIPTION OF EMPLOYEE FIRED FOR SMOKING IN THE MILL

You are the son of one of the old members of the co-operative who is a prominent farmer in the community. There are older sons at home, and you are not needed on the farm. You would like to get away from home, anyhow - - -

When your father asked the manager of the co-operative if they had any jobs open, the Manager found a place for you in the mill. It was a nice place to work, until they got that new Supervisor.

When the old Supervisor was in charge, everybody got along fine. No-one worked very hard, but they did what had to be done.

You feel that the new Supervisor was unfair to you. After all, you deserve a second chance. You saw the "No Smoking" sign, but everybody needs a break, and you were just having one cigarette, and you planned to be sure to put it out when you were through smoking . . .

After all, you come from an important family, and this new young Supervisor better show a little more respect.

Of course, you feel you are too good to stay in the mill, and that you plan to work up to a better job. In a few more months you believe you would know how to run the mill, and could take over the Supervisor's job . . .

In other words, you are a well-meaning young man, who thinks he knows more than he does, and is used to getting his own way.

SPECIMEN ROLE-PLAY EXERCISE No. 2

MOVEALONG MULTIPURPOSE CO-OPERATIVE SOCIETY

From an idea by participants in the 1973 Education and Training Course at the International Co-operative Training Centre, Stanford Hall, Loughborough, U.K.

APPLICATION:

Every person participating in the exercise is given a copy of this paper about twelve hours before the exercise is due to begin. Each individual member of the group is given a copy of a paper describing the role he is to play. After the role play, the rest of the class discuss the performance of the role players.

DESCRIPTION OF THE SITUATION

Transportation of members' produce is one of the activities undertaken by the Movealong Multipurpose Co-operative Society. For this purpose the Society maintains a seven-ton lorry. The revenue from the operation of the lorry and its running costs have been estimated in the budget of the current financial year of the Society.

The Secretary of the Society has compiled the income and expenditure figures for the operation of the lorry during the first six months of the financial year and has compared these with the provision in the budget.

Alarmed by the heavy losses sustained by the lorry, the Secretary has made out a report on the basis of these figures and has asked the chairman of the Society to convene a transport sub-committee meeting, inviting also the Co-operative Officer to review the report so far as it refers to the operation of the lorry. The transport sub-committee comprises three committee members and the chairman.

The Secretary's report is centred on the following figures:

ADJUSTED FINANCIAL STATEMENT FOR THE PERIOD JANUARY - JUNE 1975

ITEM	BUDGET		ACTUAL		Difference
	Income	Expenditure	Income	Expenditure	
Sales of transport	£12,000		£9,600		£2,400
Fuel and Oil		£3,000		£4,950	£1,950
Repairs & Maintenance		£2,000		£2,400	400
Depreciation		£1,000		1,000	-
Wages		500		500	-
Insurance		250		250	-
Licence		150		150	-
Sundry Expenses		250		400	150
TOTAL	£12,000	£7,150	£9,600	£9,650	£4,900
Surplus/Loss		4,850+		50+	£4,900 ^{total loss}

MOVEALONG MULTIPURPOSE CO-OPERATIVE SOCIETY

Slip for THE CHAIRMAN

You have been chairman of this society for several years. You are knowledgeable on meetings procedure and today you have convened a committee meeting whose main agenda centres on the losses sustained by the society's vehicle. As usual in such meetings, the Secretary of the society and the local Co-operative Officer are also present.

You have all the papers related to this meeting: Minutes of the previous sub-committee meeting, notice of the meeting, the agenda and the Secretary's report.

Bearing in mind that this meeting has been convened to discuss and find a possible solution to a serious issue affecting the society, use your skill as a good chairman to conduct the meeting so that it leads into some positive conclusions likely to remedy the situations, rather than mere accusations.

Slip for COMMITTEE MEMBER I

You have been on this sub-committee for a year and you are conversant with the work of the society. Lately you have been hearing some gossip in the village about the society's lorry being used for private business by the driver, but you have always dismissed these as unfounded rumours that could not be substantiated. You are convinced that the losses have been caused by rising oil prices. You feel that transport charges should be raised. Everybody is doing that these days.

Slip for COMMITTEE MEMBER II

You have been on the committee for the past three years and were nominated to serve on this sub-committee six months ago. Some people call you the "trouble shooter" because you are always outspoken. You don't mind being called anything as long as you are doing this for the good of the society. Why, for instance, have transport sales dropped when everyone knows that there is such a high demand for transport? You are aware that some farmers had had to hire private transport for their produce because the lorry couldn't cope with the high transport demands and yet transport sales have gone down. What justifications are there for the over-expenditure on fuel, maintenance and sundry expenses? You want all these queries explained or else the Secretary should be fired immediately.

Slip for COMMITTEE MEMBER III

You have been on this sub-committee for six months and you feel that the transport business does not really pay even though it is a service to members. You feel strongly that this service should be discontinued. Give your arguments for this.

Slip for THE CO-OPERATIVE OFFICER

You have known the affairs of the society since you were transferred to the district several months ago. You have always had the impression that the society was operating satisfactorily . . . that was until you read the Secretary's report. On checking the records you found out the following facts:

- The lorry log-book was not properly kept. Purchases of fuel were properly vouched for and entered in the log-book but some trips made by the lorry were not recorded. The mileage reading on the vehicle did not tally with the records in the log book.
- The lorry was three years old but you are satisfied with its road-worthiness. You feel, however, that it needs a thorough mechanical check.
- As a result of the oil crisis, the price of fuel had gone up by 20%. This was not taken into account when the budget was drawn. Even then, you still feel that the purchase of petrol does not tally with the sales of transport.

Advise the meeting as to what should be done.

Slip for THE SECRETARY

You have been Secretary of this society for three years. The society provides a variety of services to its members, one of which is transport. Because of the complex nature of the society's business you have not had time to deal with transport matters. You have designated all the responsibilities of transport to one of your senior clerks. Things seemed to run smoothly until the other day when you were doing your occasional cost analysis that you discovered the transport section was losing money. Suggest to the Committee what should be done.

SPECIMEN ROLE PLAY No. 3

NSO CREDIT UNION - A Problem of Apathy

Contributed by The University Center for Co-operatives
University of Wisconsin
Madison, U.S.A.

General Situation

The NSO credit union has been troubled in the past two or three years by an almost total lack of interest in the credit union affairs on the part of the general membership. No one but the officers and a few other loyal souls come out to credit union meetings and there is practically no understanding among the members about the credit union's problems. They are doing pretty well economically and do not seem to realise the potential dangers of being complacent about some of the social and economic problems the credit union ought to be working on for the future. Also, there seems to be a growing attitude in the general public that there is not much democracy in the way credit unions are being run, and the officers of the credit union would like to do something to improve their organisation in this respect, too. You cannot have a democracy if people do not come to the meetings.

Role for the Credit Union Treasurer-Manager

You are Treasurer-Manager of the NSO Credit Union. You have held this office for several years, having been re-elected without opposition the last two times. You feel that there are not many people who have the initiative to assume responsibilities in an organisation, and have found that the best way to get things done is to do them yourself. Even the other officers in your credit union are better at talking than working, so you have just taken credit union matters pretty much into your own hands. When problems needed to be solved, or decisions made for the organisation, you have worked them out yourself.

You feel that the people in the credit union have confidence in you, and have been satisfied with your leadership or they would not have kept re-electing you to office. You are disturbed, however, that so many members take such an irresponsible attitude toward the credit union's problems, because you know you cannot have a strong credit union without the wholehearted support of the members.

You have to figure out some way to get co-operation in the programmes and policies you have worked out for them.

Role for the Vice-President

You are a young person and relatively new to credit union leadership. You think that credit unions are one of the most important things to which a person can devote his time, and you are extremely eager to work hard for the organisation. Since your election at the last annual meeting, you have not been given a chance to do very much. The President and the Treasurer seem to have things pretty much well in control, and although you would like to volunteer to take on some responsibilities, you have not yet seen much of an opportunity. You feel that this problem of getting more interest and support from the general membership is very important, and that perhaps there are others like

yourself who would like to do something for the group but do not quite know how to go about it. Maybe if they were given more chance to speak up at meetings and express their ideas on things, or were appointed to committees to work on various projects, they would show more enthusiasm. Now they can just sit back passively because everything is being taken care of for them. They may think this is okay now, but what happens to the organisation if something were to happen to the clique now running things? Nobody else would know how to take over.

Role for the Secretary

You do not approve of the way this organisation has been run for the past few years, but it is difficult, if not impossible, to say anything about this. The President, with the support of the Treasurer-Manager, both of whom have been running things for a long time, seem to enjoy the confidence of the general membership, and are re-elected at each annual meeting. Also, they do their jobs efficiently, so there is no real agitation for a change. Anyone who spoke up against them would really get the cold shoulder.

However, it is your feeling that in spite of the Treasurer's great efficiency and big ideas, he is himself one of the main causes of the difficulty the credit union is now having in maintaining the interest and support of its members. He seems to have the attitude that no one but himself has any brains or sense of responsibility, so he keeps all the power he can to himself and never seeks anybody else's ideas or help. No wonder people lose interest.

Even though you are an officer, you have practically lost interest yourself in coming to meetings. What's the point? Nobody cares what you think, so it is kind of useless to bother. And you suspect that this explains the complacency of a lot of the members. Why should they come to meetings just to sit around and listen to the President and Treasurer making long speeches? However, you feel that it is a dangerous atmosphere for the health of the organisation, and that if something doesn't happen soon, the credit union will be on its last legs.

Role for the President

You are the President of the NSO Credit Union. You have held this office for several years, having been re-elected without opposition the last two times. You have worked closely with the Treasurer-Manager over these years, and feel that he has done an excellent job. He is a real "ideal man" and a vigorous leader. You feel that the people in the credit union do not truly appreciate the tremendous amount of work he does for them. They just take him for granted.

You are not too disturbed about the fact that the general membership does not take an interest in credit union affairs. What difference does it make as long as things get done? The Treasurer-Manager has certainly proved himself capable of handling things very efficiently, and in the best interests of the membership.

As President, you feel you have done your duty, by seeing that the meetings of the board of directors are held each month, and by presiding at these meetings and the annual meeting. If anything else needs to be done, the Treasurer-Manager will tell you what to do.

ROLE PLAY EXERCISE No, 4

A GROUP DYNAMICS EXERCISE IN PROCEDURE AT MEETINGS

Goals

1. To make the participants aware of parliamentary procedures.
2. To make the participants experience interaction in a formal situation.
3. To stress the importance of knowing parliamentary procedures.

Group Size

The whole class.

Physical Setting

Classroom seating arrangement
One chair and table for Chairman
One gavel or any substitute

Materials Needed

Role slips for active participants.

Time Required

1½ hours

Process

The Agenda for the monthly meeting of the Samahang Nayon* is on the blackboard. The meeting has begun. The exercise begins with No. 4 – Reports of officers and standing committees.

Instructions

1. Ask for volunteers for the following:
 - a. President
 - b. Vice-President
 - c. Secretary-Treasurer
 - d. Manager
 - e. Auditor
 - f. Mang Teryo
 - g. Mang Ambo
 - h. Aling Sion
 - i. Julian
2. Give each one his role slip.
3. Give them five minutes to read their roles. After studying their roles, the participants should put them away and start the meeting.
4. Facilitator writes the agenda on the blackboard,

* A form of village-level Co-operative Organisation in the Philippines.

AGENDA

1. Call to order.
2. Roll call
3. Reading of the minutes of the past meeting
4. Reports of officers and standing committees
5. New business
6. Adjournment

ROLE SLIP FOR PRESIDENT

You will preside over the meeting. You will call for the reports of officers and standing committees. You will allow as much discussion as possible.

If the members want to vote on a motion, you shall preside over the voting.

You will give your opinion at every opportunity. You are free to interrupt speakers who do not agree with you because most members trust your good judgement.

All officers of the Samahang Nayon, with the exception of the Auditor, are known to be skilful and reliable. The Vice-President and Secretary-Treasurer, in particular, are very competent officers and know what they are saying. The Auditor is your "friend" but is incompetent.

Mang Teryo, whose farm was taken over, is also your kumpadre.

ROLE SLIP FOR VICE-PRESIDENT

You will give the following report:

" There are 25 new members in the Samahang Nayon, and 20 of them have completed the pre - membership education programme. The remaining 5 are undergoing remedial courses".

" The Education and Training Committee is now conducting the training of Samahang Nayon members in management. The members have completed Lesson 5. Attendance has been good".

" The Education and Training Committee spent P325.00 for the Pamantasan sa Nayon programme and P175.00 for education and training materials purchased in bulk. The Committee proposes a training budget of P500.00 for the next period".

If given the chance, you will question some figures in the report of the Secretary-Treasurer regarding Education programme. You are highly respected by the members, although some officers envy you.

The Secretary-Treasurer was once a money-lender and he has a reputation for being skilful in mysterious financial matters.

The Manager is a good and trusted friend. Like you, he is very efficient, but he also has many enemies.

The Auditor is a yes-man. He is easily influenced by others. Like the President, who is his kumpadre, the Auditor is a weak officer and leader.

ROLE SLIP FOR SECRETARY-TREASURER

Your report is as follows :

Receipts :

5% of all production loans	1,750.00
Monthly savings of members	1,310.00
Total cash value of Barrio Guarantee Fund	3,450.00
Membership Fees and dues	810.00
Income from sale of leaflets	125.00
Commissions from sale of cottage industry products	1,000.00
Income from demonstration projects	1,125.00
<u>Total receipts for the year</u>	<u>9,370.00</u>

Expenses.

Pamantasan sa Nayon	325.00
Membership Campaign	275.00
Advance for farm management take-over	300.00
Travel and other expenses	155.00
<u>Total disbursements</u>	<u>1,055.00</u>

You will question some figures in the report of the Vice-President because they do not agree with your report. However, the Auditor agrees with your report and he has approved it in full.

You were once a money lender and are therefore known to be skilled in financial matters. Both you and the Auditor believe that Samahang Nayon officers should derive monetary benefits from their functions and both of you act accordingly.

The Auditor is the kumpadre of the President.

The President is a weak leader. You can say anything you like because he has little control over you or over the members.

ROLE SLIP FOR MANAGER

Your report is as follows :

Contributions to BGF in kind - 90 cavans at cash value of	2,340.00
Contributions to BGF in cash	.. 1,110.00
<u>Total cash value</u>	<u>3,450.00</u>

Demonstration project for fertilizer: 2nd month of implementation.

Demonstration project for insecticides: 1st month of implementation.

Demonstration project for hogs: pigpen is under construction with contributions from members.

Demonstration project for poultry: project study is presently being undertaken.

In the past year, 4 farms were taken over.

Farm * 1 : Teryo Salazar; management has been returned
Farm * 2 : Kardo Salas; management has been returned
Farm * 3 : Lusing Suguid; management on-going

Because you are very efficient in farm management, some members whose farms have been taken over dislike you and would like to discredit you.

The Vice-President is an efficient officer. He is your close friend and you will therefore come to his assistance whenever necessary. He is the best officer.

The President is the kumpadre of the Auditor. The President is a permissive leader who has little control over the members. You can therefore say anything you wish since he has no control over you.

The Secretary/Treasurer was once a money lender. Many people are suspicious of his activities with the Auditor regarding the signatures on the receipts or disbursement vouchers. You cannot prove anything about him or the Auditor, but they are giving the board a bad image. You want their activities investigated.

The Auditor has approved your report in full.

ROLE SLIP FOR AUDITOR

Your Report is as follows:

You have examined the financial report of the Secretary-Treasurer in detail and have reviewed all receipts and vouchers. Everything is in order. You have therefore approved his financial report in full.

You have examined the financial report of the Manager and it is also accurate. You have also approved his report.

In reality, the Secretary-Treasurer has not been very conscientious in his duties. You have discovered what appear to be overstated expenses, but he has convinced you that such matters are best kept among friends. He was once a money lender.

You are the kumpadre of the President. The President has a very high opinion of the Secretary-Treasurer and will not believe anything unfavourable about him. The President is a weak leader.

The Vice-President is a very suspicious man. He will try to create an issue about small matters because he wants to discredit everybody else. In your opinion, he wants to become President. He dislikes you and suspects you of underhanded activities.

You must help the President maintain order in the meeting in case the Vice-President is out to create trouble.

You do not know too much about the Manager except that he is very efficient and is disliked by members whose farms were taken over.

ROLE SLIP FOR MANG TERYO

You will question certain items of the Manager's report. Your farm was taken over by the Samahang Nayon and the Manager was not very honest with his accounting. You lost P250.00 in this way.

If you are not allowed to ask questions or to discuss these matters, insist on your right to speak and be heard. If the officers do not want to listen to you, address your complaint to the members.

The President of the Samahang-Nayon is your kumpadre.

ROLE SLIP FOR MANG AMBO

If the discussions become heated, you will present a motion to discontinue the meeting. You know that there is much rivalry among the officers of the Samahang Nayon and that they may only use the meeting to express their hostilities. Even the President is taking sides and he is therefore unreliable.

You will demand that your motion be put to a vote. You cannot accept "No" for an answer because the officers will only be wasting the time of the members. If the officers refuse, you shall address your complaint to the members.

ROLE SLIP FOR ALING SION

You will second every motion presented. You are the wife of the Manager. You will tell Mang Teryo to stop questioning the Manager's report. Mang Teryo's farm was taken over by the Manager unjustly and deprived him of some money. But this is not true. Mang Teryo owed more money to the Samahang Nayon than he thought because he was a very negligent member. The Manager only did his duty.

You are a relative of the Vice-President, and you will come to his assistance whenever necessary.

The Secretary-Treasurer was once a money-lender and is a sly and mysterious man.

ROLE SLIP FOR JULIAN

You know that the Auditor and the Secretary-Treasurer are involved in questionable activities regarding funds of the Association. You would like this matter to be investigated by the members.

You are the kumpadre of Mang Ambo and will come to his assistance whenever necessary. You will help him to solicit support for his motion by addressing yourself to the members.

Taken from:

MANAGEMENT TRAINING MANUAL (CO-OPERATIVES DEVELOPMENT PROGRAM
Phase II Development of Samahang Nayan)

Produced by Bureau of Co-operatives Development,
Department of Local Government and Community Development,
The Philippines.

May, 1973.

4.5 SPECIMEN DEBATING EXERCISE

SPECIMEN DEBATING EXERCISE

Contributed by The University Center for Cooperatives,
University of Wisconsin,
Madison, U.S.A.

Purpose: To demonstrate a technique of Cooperative Education that can help people to become informed about different views on a subject as a basis for decision making.

Subject: Relations between cooperatives and governments.

Proposition: Government should play no role in cooperative development, except for providing a law for cooperative organisation and registration.

Moderator: A chairman, or moderator, is appointed.

Debaters: 4 speakers are appointed, 2 affirmative and 2 negative.

Judges: 4 members of class are appointed as judges.

Organisation of the Debate:

Total debate takes place in one hour followed by a break, during which judges decide the winning team.

Following the break, the judges will announce their decision, give their reasons, and all members of the class will engage in a group discussion of the issues.

<u>Timing:</u>	Moderator introduces the debaters and announces topics and times	..	1 minute
	First Affirmative	8 minutes
	First Negative	8 minutes
	Second Affirmative	8 minutes
	Second Negative	8 minutes
	First Negative Reply	4 minutes
	First Affirmative Reply	4 minutes
	Second Negative Reply	4 minutes
	Second Affirmative Reply	4 minutes

(An automatic timing device will be used)

NOTE:

This is an educational debate. In an educational debate the judges are instructed to disregard the merits of the proposition and to make their decision on how good a job the debaters do.

The proposition is deliberately worded in a provocative style to sharpen the discussion. A specimen judging form is attached.

JUDGING FORM

I. Quality of Debating

NOTE: Assign to each speaker the points which best describe your evaluation of the quality of debating. 1 - poor; 2 - fair; 3 - good; 4 - excellent; 5 - superior.

	Name:.....					Name:.....				
	First affirmative					First negative				
	1	2	3	4	5	1	2	3	4	5
Analysis - plan of case --										
Knowledge and Evidence										
Reasoning, inferences --										
Adapting to opposing case										
Skill in refutation --										
Speaking skill --										

TEAM TOTAL POINTS

	Name:.....					Name:.....				
	Second affirmative					Second negative				
	1	2	3	4	5	1	2	3	4	5
Analysis - plan of case --										
Knowledge and Evidence										
Reasoning, inferences --										
Adapting to opposing case										
Skill in refutation --										
Speaking skill --										

TEAM TOTAL POINTS

NOTE:

Please rank debaters in order of their excellence by placing 1, 2, 3 or 4 in parentheses to the right of the debater's name. (1 indicates the most effective; 4 the least effective)

Decision: The more effective debating was done by: _____