International Cooperative Alliance

NATIONAL COURSE IN TRAINING METHODOLOGY AND TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES, October 6 - November 5, 1980.

ACCI, UPLB, LAGUNA, PHILIPPINES

CONTENTS

....

International Cooperative Alliance
Regional Office & Education Centre
for South-East Asia (ICA ROEC)
"Bonow House" 43, Friends Colony
New Delhi - 110065 (India)

February 11, 1981

NATIONAL COURSE IN TRAINING METHODOLOGY & TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

ACCI, PHILIPPINES - OCT. 6 TO NOV. 5, 1980

BRIEF REPORT

1. The Course in Training Methodology for Cooperative Teachers in the Philippines was held at Agricultural Credit & Cooperatives Institute (ACCI), University of the Philippines at Las Banos (UPLB), Laguna, Philippines, from 6th October to 5th November 1980. The course was attended by 23 cooperative teachers as participants, several observers and resource persons, who are listed in the Annexe-A.

2. The course was inaugurated by Dr. P. Sandoval, Dean, College of Development Economics and Management, UPLB, on the 6th October 1980. It was organised and held by the ACCI in collaboration with the Bureau of Cooperatives Development (BCOD), Cooperative Education and Training Fund (CETF), and the ICA Regional Office & Education Centre for South-East Asia (ICA ROEC). The course was directed by Dr. Rodolfo M. Matienzo, Director, ACCI and Dr. Dharm Vir, Joint Director (Education) of the ICA ROEC. They were assisted by course coordinators and the secretariat staff. Under the sponsorship of the ICA ROEC, Dr. S.C. Mehta participated as a resource person.

3. The course programme was designed on the basis of the following objectives:

(1) To orient the participants in participative methods, especially in the case study method of cooperative training.

(2) To guide and assist them in the preparation and use of case studies for management training of cooperative personnel.

(3) To encourage the participants to make increasing and effective use of participative techniques so as to improve their performance on the job.

4. A copy of the course programme is enclosed as Annexe-B. As can be seen from the programme the course was divided into the following parts:

(a) General Introduction
(b) Case Workshop
(c) Role Play, Business games and other techniques
(d) Audio-Visual aids and training packages.

5. The main emphasis during the course was laid on case study method. As a part of the course, a case workshop was conducted mainly to provide knowledge and skills in the preparation and use of management cases. The participants were divided into five groups in order to study five different cooperatives and prepare case studies on the main problems of these cooperatives. Each group was provided with a Supervisor. The groups visited the cooperatives allotted to them and prepared detailed case studies thereon. These case studies were used by the case writers for teaching cooperative management in the course sessions. After the class-room teaching, each case study and its presentation was evaluated by other participants on specially designed forms. The supervisors and resource persons also gave their comments on the case studies. In addition, case writers attended case clinics arranged under expert guidance. In the light of the various comments and suggestions received the case writers revised their case studies and thus finalised the educational materials under the following titles:

(1) The Unsinkable Credit Cooperative Inc.
(2) The Fundowalah Consumers' Cooperative.
(3) The "Walang Katapat" District Credit Coop. Inc.(A Boon or a Bane)
(4) Cooperative Rural Bank of Penafrancia, Inc.
(5) The Hardilad Area Marketing Cooperative Inc.

6. It is hoped that the materials produced during the workshop will be useful for teaching cooperative management in the field. A list of all the materials distributed among the participants is attached as Annexe-C.

7. The participants were oriented in Psychology of Adult Learning, Communication Process, various methods and techniques of cooperative education and training, audio-visual techniques and training packages. An exhibition of selected educational and training materials produced by the ICA-CEMAS and other agencies was arranged in the auditorium of ACCI. The exhibits remained accessible to the participants throughout the course. The organisers of the course sincerely believe that these methods and techniques will help the participants in improving their performance on the job as cooperative teachers and educators.

8. On 30th October 1980, the participants divided themselves into functional groups and held a short seminar on how to improve the effectiveness of cooperative training and education in the Philippines. They also gave

their suggestions on the facilities needed by the cooperative teachers for improvement of their performance on the job. The common recommendations which emerged were provision of expanded and systematic training of cooperative teachers at different levels in the Philippines, and furnishing of adequate facilities and incentives. The groups have also suggested that the integration of Cooperation with the school/college curricula should continue and these be made more practicum oriented. The ICA should organise more courses for cooperative teachers in the Philippines.

9. Towards the end of the course, an evaluation of the programme by the participants was conducted and some useful discussion about the follow-up of the present course was held. Appreciating the present course, participants suggested that more courses especially in audio-visual aids and participative techniques should be organised. They suggested a follow-up programme for the present course.

10. The course which was the result of cooperative efforts of several agencies such as ACCI, UPLB, CETF, BCOD and the ICA ROEC was concluded in the evening of 4th November 1980. The key-note address at the closing ceremonies was delivered by Dr. Higino A. Ables, Vice-Chancellor for Academic Affairs, UPLB. The certificates of completion were awarded to the participants by Dr. R.M. Matienzo, Director, ACCI. During the concluding session, Dr. Dharm Vir of the ICA ROEC read a brief report about the course. He also thanked all the participants and the following agencies for providing resource persons and other support for the course:

i. ACCI, College of Development Economics and Management (CDEM).
ii. Department of Development Communication (UPLB).
iii. South-East Asian Regional Centre for Graduate Study in Research and Agriculture (SEARCA).
iv. Vaikunth Mehta National Institute of Cooperative Management (VMNICM), Pune, India.
v. Bureau of Cooperatives Development (BCOD).
vi. National Media Production Centre (NMPC), Manila.
vii. University of the Philippines at Los Banos (UPLB).
viii. Philippine Rural Reconstruction Movement (PRRM).
ix. Cooperative Societies visited by the participants and resource persons for preparation of case studies.

....

vn/

ANNEXE-A

AGRICULTURAL CREDIT AND COOPERATIVES INSTITUTE
University of the Philippines at Los Baños
College, Laguna

TRAINING METHODOLOGIES AND TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES
October 6 - November 5, 1980

PARTICIPANTS/RESOURCE PERSONS/COORDINATORS/MANAGEMENT STAFF DIRECTORY

NAME	DESIGNATION	OFFICE ADDRESS	PERMANENT ADDRESS
1. ANDRADA, Felipe D.	Water Management Engineer	NIA - CLGIP Urdaneta, Pangasinan	#22 S. Jimenez St. Lingayen, Pangasinan
2. BATOON, Jacinto R.	Training Specialist	ACCI - UPLB College, Laguna	ACCI - UPLB College, Laguna
3. BENITO, Felix L.	Assistant Chief	Education & Training Division Bureau of Coops. Development Ministry of Agriculture	Urdaneta, Pangasinan
4. BOADO, Ernesto M. SR.	Coop Development Officer	Bureau of Coop Development Ministry of Agriculture	92 K-3rd Kamuning Quezon City
5. CUARESMA, Emmanuel T.	Research Asst. III	ACCI-UPLB College, Laguna	#30 Masbate West Avenue, Quezon City
6. DE LARA, Sylvia I.	Vice Chairman	Education & Membership Committee Damayan KB sa Pananalapi M. L. Quezon High School Metro Manila	1935 Narra Extension Tondo, Manila
7. DESPOJO, Sister Lina R.	Staff Member	Cooperative Education Center La Consolacion Convent San Juan, Metro Manila	La Consolacion Convent San Juan Metro Manila

NAME	DESIGNATION	OFFICE ADDRESS	PERMANENT ADDRESS
8. IGLENCIO, Evelyn T.	Training Officer	Bureau of Coops. Development Ablaza Building Quezon City	1566 B 4th St. La Estate Subdivisio Paco, Manila
9. ESTACIO, Patrocinio R.	Secretary	Philippine Federation of Women for Cooperatives, Inc. Metro Manila	1330 La Paz Galicia, Manila
10. ESTIOKO, Pastor	Information Writer	NIA-CLGIP Tarlac, Tarlac	Binalonan, Pangas
11. GUEVARRA, Yolanda C.	Research Assistant	ACCI-UPLB College, Laguna	9-A San Francisco San Pablo City
12. LAPITAN, Josefina E.	Editorial Assistant	ACCI-UPLB College, Laguna	72 J. de Pasupil Los Baños, Laguna
13. LOPEZ, Julita C.	PHILCUL Staff	PFCCI E. Rodriguez Sr. Quezon City	115 Bignay St. Project 2 Quezon City
14. UMPAGOS, Corazon R.	Chairman Credit Committee	PUP Credit Cooperative Polytechnic University of the Philippines, Metro Manila	2051 Hippodromo St Sta. Mesa, Manila
15. MANZANO, Eleanor C.	Training Associate	ACCI-UPLB College, Laguna	715 Batong Malake Los Baños, Laguna
16. MARTIN, Romulo T.	Assistant Professor	Institute of Cooperatives Polytechnic University of the Philippines Lepanto, Manila	2026 Anonas St. Sta. Mesa, Manila

	NAME	DESIGNATION	OFFICE ADDRESS
17.	MATE, Daisy Belle E.	CEC Staff Member	Cooperative Education Center La Consolacion Convent San Juan, Metro Manila
18.	MAYUGA, Angelito S.	Agricultural Extension Specialist	NIA-TISIP Matatalahib, Tarlac Tarlac
19.	MEDINA, Winifrida D.	Training Associate	ACCI-UPLB College, Laguna
20.	NAZARENO, [illegible] B.	Coop Development Officer	Promotion and Supervision Division Bureau of Coops. Development Ministry of Agriculture
21.	PERIA, Arminge B.	Research Assistant	ACCI-UPLB College, Laguna
22.	SALCEDO, Avelino M.	Training Associate	ACCI-UPLB College, Laguna
23.	TORRALBA, Amado B.	Training Official	Bureau of Coops. Development Ministry of Agriculture Metro Manila

Resource Persons:

	NAME	DESIGNATION	OFFICE ADDRESS
1.	Dr. Dharm Vir	Joint Director (Education) & Specialist in Educational Methods	International Cooperative Alliance, ROEC for South East Asia New Delhi
1.	Dr. Vicente U. Quintana	Professor V	ACCI-UPLB College, Laguna
2.	Dr. Rodolfo M. Matienzo	Director	ACCI-UPLB College, Laguna

NAME	DESIGNATION	OFFICE ADDRESS	PERMANENT ADDRESS
2. Dr. Swaroop Chandra Mehta	Professor, Financial Management and Banking	Vaikuntha Mehta National Institute of Cooperative Management Ganeshkhind Road - 4110016 PUNE (INDIA)	1204/21 Jungli Maharaj Opp. Bal Gandharva Coop. College Hostel Pune 411004
3. Prof. Edward S. Tayengco	Manager	Agribusiness and Related Projects SEAMCA	#2 Doña Aurora St. SEAMCA Housing College, Laguna
4. Dr. Willie C. Depositario	Associate Professor & Chairman	Department of Agrarian and Cooperatives Studies CDEM, UPLB	Pleasant Village College, Laguna
5. Atty. Clemente E. Terso, Jr.	Director	Bureau of Cooperatives Development 117 Ablaza Building E. Rodriguez Avenue Quezon City	
6. Atty. Bienvenido Faustino	ICA Council Member for the Philippines	CISP Delta Building West Avenue, Quezon City	

Coordinator/Management Staff:

1. Constancia J. Caballero	Training Specialist II	ACCI-UPLB College, Laguna	
2. Alonso L. Pinlac	Chief, Education Training Division	Bureau of Cooperatives Development 117 Ablaza Building E. Rodriguez Avenue Quezon City	

	NAME	DESIGNATION	OFFICE ADDRESS
3.	Dominador C. Punzalan	Training Specialist I	ACCI - UPLB College, Laguna
4.	Teresita Zamiza	Supervising Cooperative Development Officer	Bureau of Cooperatives Development 117 Ablaza Building E. Rodriguez avenue Quezon City
5.	Eater Tocay	Training Specialist	Philippine Rural Reconstruction Movement San Leonardo Nueva Ecija

Annexe-B

NATIONAL COURSE IN TRAINING METHODOLOGY & TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

PROGRAMME

DAILY SCHEDULE

0900 - 1030 hrs	:	Session I
1030 - 1045 "	:	Coffee break
1045 - 1215 "	:	Session II
1215 - 1400 "	:	Lunch break
1400 - 1530 "	:	Session III
1530 - 1545 "	:	Coffee break
1545 - 1715 "	:	Session IV

....

Oct. 6, 1980, Mon.

Session No. 1	Inauguration	Dean P. Sandoval
2	Personnel Introductions, Objectives and Working Methods of the Course	Dr. Vir, Dr.Quintana Atty. Faustino
3	The Role of ICA-CEMAS; ACCI; and BCOD in Cooperative Training	-do-
4	Determination of Cooperative Training Needs of Participants	Dr. Vir and Dr. Quintana

Oct. 7, Tuesday

5	Psychology of Adult Learning and Communication Process	Dr. Vir and Ms. E. Tucay
6	Methods and Techniques of Cooperative Training	Dr. Vir
7	Case Study Method in Management Training	Dr. Vir, Dr. Mehta Prof.E. Tayengco
8	Tools of Case Analysis	Prof.E. Tayengco

Oct. 8, Wednesday

9	Tools of Case Analysis (contd.)	Prof.E. Tayengco
10	Teaching with Case No.1 and 2	-do-
11	How to write a case?	Dr. Mehta
12	How to teach with a case?	-do-

10

Oct. 9, Thursday

13-14	Teaching with Case No.3 Exercise in Case Writing - Micro Case No.1 (pp.75-77 CEMAS Case Writing Workshop Manual)	Dr. Vir
15-16	Teaching with Case No. 4	Dr. Mehta

Oct. 10, Friday

17	Preparation of Case Studies	Supervisors:
	Leave Los Banos for Field Work and Preparation of Case Studies (The participants would be divided in eight groups of two-three each. The groups will visit eight societies in different areas. The groups will be guided by supervisors. The Case Studies would be ready in the field itself.)	Dr. Vir Dr. Mehta Dr. Quintana Dr. Matienzo Mr. Punzalan

Oct. 18, Saturday Return to ACCI - Los Banos

Oct. 20, Monday

18-19	Teaching with Case No. 5 & 6	Prof.E. Tayengco
20	Discussion Leading	Dr. Mehta

Oct. 21, Tuesday

	Teaching with Cases by participants	
21-22	Teaching with Case (1)	
23-24	Teaching with Case (2)	

Oct. 22, Wednesday

25-26	Teaching with Case (3)	
27-28	Teaching with Case (4)	

Oct. 23, Thursday

29-30	Teaching with Case (5)	
31-32	Revision of Cases and Case Clinics	

Oct. 24, Friday

33	Evaluation of Case Workshop	Dr. Vir Ms.C.J. Caballero
34	Evaluation of Coop. Training	Panel Discussion
35-36	Slide and Film Show	

Oct. 25, Saturday		
	Revision of Cases by participants	
Oct. 27, Monday		
37-38	Introduction to Role Play and other Techniques	Dr. Vir
39-40	Demonstration of Role Plays	Mr. A. Pinlac Dr. Vir
Oct. 28, Tuesday		
41-42	Business Games	Prof.E. Tayengco
43-44	Other Techniques	Dr. W. Depositario
Oct. 29, Wednesday		
	Revision of Cases (contd.)	
Oct. 30, Thursday		
45	Audio-Visual Aids in Cooperative Training	Dr. Vir
46	Concept of Training Package	Dr. Mehta
47-48	Demonstration of Training Package No.1	Ms.C.J. Caballero
Oct. 31, Friday		
	Revision of Cases (contd.)	
Nov. 1, Saturday	ALL SAINTS' DAY (HOLIDAY)	
Nov. 2, Sunday	F R E E	
Nov. 3, Monday		
49-52	Audio-Visual Aid and Techniques	NMPC
Nov. 4, Tuesday		
53-54	Demonstration of Training Package No. 2	Ms. E. Tucay
55-56	Demonstration of Training Package No. 3	Ms. E. Manzano
Nov. 5, Wednesday		
57	Conclusion, Evaluation and Follow-up	
58	CLOSING CEREMONY	

....

vn/

Annexe-C

NATIONAL COURSE IN TRAINING METHODOLOGY & TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

LIST OF MATERIAL DISTRIBUTED AMONG THE PARTICIPANTS

1. Remarks by Dr. D. Vir, ICA ROEC
2. ICA Cooperative Education Materials Advisory Service (CEMAS) - An Introductory Note
3. The Communication Process - Ms. Ester V. Tuday
4. Psychology and Management of Adult Learning - Dr. D. Vir
5. Case Method in Managing Training
6. How to Select, Recruit, and Research Case Study Subjects
7. How to Write Case Studies
8. The Presentation, Disguise and Release of Case Studies
9. How to Teach with Case Studies
10. Good Writing
11. Micro Case 1 - Transcript of a Conversation between A Cooperative College Lecturer and the Manager of a Primary Cooperative Society
12. The Cooperative Cattle Dip
13. Workshop Evaluation Form
14. Cattle Dip - Amado B. Torralba
15. Content and Process in Case Method Teaching - L - Lieutenant Colonel Charles R. Holloman
16. Cooperative Training College, Sri Pattan (Background Note for the Teacher) - Dr. S.C. Mehta
17. The Unsinkable Credit Cooperative Inc. - A Case Study by Group-I
18. The Fundowalah Consumers Cooperative (A Boon or a Bane) - A Case Study by Group-II
19. The Walang Katapat District Credit Cooperative, Inc. - A Case Study by Group-III
20. Cooperative Rural Bank of Penafrancia, Inc. - A Case Study by Group-IV
21. The Hardilad Area Marketing Cooperative, Inc. - A Case Study by Group-V
22. Group Discussion - Dr. S.C. Mehta
23. The Two Million Rupees Contract That Got Away and the Foreign Travel that Never Was
24. Background Note for the Teacher (For management case)
25. Observersation Sheet

3) Regional Seminars and Workshops for middle-level cooperative personnel and government officials.

4) Teachers' Training and Development Programmes.

5) National level seminars, workshops and training courses.

6) Field level projects in cooperative education and training.

7) Research and Consultancy.

8) The Cooperative Education Materials Advisory Service (CEMAS)

Participants and delegates from the Philippines have been attending the ICA educational programmes in the Region, especially in the Regional Courses on Training Methodology and Techniques. So far three courses have been organised at Pune, India by the ICA ROEC and six cooperative educators from this country have participated in them.

COOPERATIVE EDUCATION MATERIALS ADVISORY SERVICE (CEMAS)

Let me add a few words about CEMAS, i.e. the Cooperative Education Materials Advisory Service, started by the ICA to improve cooperative education methods and materials in developing cooperative movements. The CEMAS has been discharging clearing house functions for cooperative educators and Cooperative Training Institutions. It also has produced a series of manuals and cooperative training materials. The CEMAS Unit at New Delhi has been engaged in the production of Training Packages, Case Studies, Role Plays, Management Case Book and Manuals on modern methods and Techniques of cooperative education for use in South-East Asian Region and elsewhere. CEMAS has been promoting production and use of audio-visual aids in Cooperative Education and Training.

The present Course which is of one month duration is skill and production oriented. It will certainly contribute to faculty development of ACCI and the Cooperative Training Centre and result in production and adaptation of suitable educational material for cooperative education and training in the Philippines. The main objectives of the training course are:

a) To orient the participants in participative methods, especially in the case study method of cooperative training;

b) To guide and assist them in the preparation and use of case studies for management training of cooperative personnel, and to encourage the participants to make increasing use of participative techniques so as to improve their performance on the job.

We will work together for the coming weeks and contribute our best to this common endeavour. We are grateful to the BCOD under the leadership of Mr. Clemente C. Terso who has invited us to assist in this very important field of cooperative development and I would like to assure that whenever you need our assistance we will do our best to meet your requests. I take this early opportunity to thank the officers and staff in the BCOD and at the ACCI for their valuable assistance and willing cooperation in the conduct of the course.

We are grateful to Dean Pedro R. Sandoval, CDEM who could find time to inaugurate the training course and say a few words of encouragement to us.

Our heartfelt thanks go to the cooperative institutions such as PHILCUL, CMSI, MTAP for their willing cooperation. At the end, I would like to convey our thanks to the UPLB, MPCP, PRRM and the NCCT, New Delhi for providing Resource Persons and other necessary assistance for the conduct of the present course.

####

fts/10/6/80

KEYNOTE ADDRESS

TRAINING METHODOLOGY AND TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

P. R. Sandoval

I take this opportunity to welcome the participants of this course. As you will note, this activity has been organized by the Agricultural Credit and Cooperatives Institute of the University of the Philippines at Los Baños and the Bureau of Cooperatives Development of the Ministry of Agriculture in collaboration with the International Cooperative Alliance, Regional Office for S. E. Asia, New Delhi, India.

I am confident that this gathering of cooperative educators shall make a contribution to the furtherance of cooperatives development in the Philippines.

At this juncture, allow me to share with you some of my random thoughts on cooperatives and on cooperative training methodology and techniques.

As a developmental instrument, cooperatives have been useful in providing favorable conditions for rural and agricultural development. Experiences in many countries, however, have shown varied levels of successes and/or failures in undertakings associated with cooperatives. We are, therefore, tempted to suggest that these variations occur because they may have been influenced by the cultural environment of the people.

In some countries, the cooperative has been particularly successful owing to the uniformity of production and the farmers' recognition of the usefulness of this form of enterprise. With rare exceptions, the cooperatives are pure business enterprises and participation depends on the advantages the farmers expect to gain. The main objectives of starting cooperatives are usually: (1) to gain the advantage of large-scale cooperation; (2) to obtain control of and to strengthen competition in all lines of production, and (3) to get new and appropriate undertakings started. While all three objectives are regularly involved together, the motives for starting any particular cooperative may be any of the three, depending on circumstances. The last objective, which is the initiation of new undertakings, is usually predominant.

The cooperative system has become an integrating part of the institutional environment to such an extent that farmers never hesitate to get together to solve new problems cooperatively.

Still in other countries, cooperatives are highly specialized according to function and enterprise. Their great success is, in no small degree, due to specialization because it normally solves the problems of contrasting interests. Consequently, the individual farmer, becomes a member of a good number of cooperatives.

Although cooperatives are almost exclusively business enterprises, they have had an invaluable indirect influence also be disseminating know-how in techniques and management. The widespread cooperatives continuously present the farmers with a number of problems of management and production which must be solved in the interests of efficiency within the cooperatives themselves as well as on the farms.

Observations in developing countries tended to emphasize that the development of successful cooperative depends largely on: (1) the education of farmers and their wives to understand cooperation and how it works which also requires continuing education for members of cooperatives (2) a government or private agency to carry on the educational program, to supply technical advice and guidance, to train personnel, to furnish supervision, and periodic auditing to develop and insure financial integrity; furthermore, the staff of such agency needs to believe strongly in self-help, mutual and philosophy of cooperation; (3) a financial agency to supply assistance to various kinds of cooperatives and loan funds for credit cooperatives; (4) a positive thrift programme to accumulate the savings of farmers in credit unions (or cooperative banks); and (5) development and training of managers and personnel to a high degree of competence so that cooperatives can complete successfully.

The examination of the steps taken to introduce cooperative makes one wonder whether they will be successful, even in the long-run. It is usually not surprising to find cooperative training courses consisting of principles of cooperation borrowed from textbooks not dissimilar to those in the early years of the cooperative movement. While courses include training in accounting, they may not include the trading and speculative aspects of marketing food crops and the entrepreneurial skills required to deal with these problems. This will mean an introduction to the realm of decision-making.

Thus, I can see the relevance of the present course. Its objectives among, others are: (1) to orient the participants in participative methods, especially in the case study method of cooperative training; and (2) to guide and assist them in the preparation and use of case studies for management training of cooperative personnel.

This leads us to the subject matter of management. As professionals, prospective managers need training no less than the other professions. Traditionally, a management school aims at training professional managers for business. Thus, its major tasks are: (1) to define the academic content of management as a field of learning, and (2) to develop a pedagogy that effectively trains practitioners of management.

Much work has been done to develop management into a distinct field of research and teaching. It is also widely accepted that the goal of management education is not that of producing "learned" or "erudite" scholars of the subject. Its educational goal is to help the trainees to acquire facility to act in the face of uncertainty and risks. "It is not how a man may be trained to know, but how a man may be trained to act". The question asked is: "can the practice of management be taught". But the question is of secondary importance to the question: "how can it be taught?"

Case studies have a great potential for achieving that objective. They make it possible for the trainees to increase their "vocabulary of experience" and draw that learning from others' experiences in dealing with concrete problem situations which they may face in the course of their career.

It is therefore, possible that this course will be the first time for some participants to be introduced to the case method of learning.

The case study method is being used as one of the teaching tools in business management. The use of the case method calls for discussion of real life situations that have been faced by executives. These situations have been written up as "cases" by case writers, who have sought as good reporters, to present to the participants of a course all of the information available to the business executives.

As you will learn, there are several types of cases, but the more oftenly used ones are the evaluation-type, the "problem" case which calls for a decision, and the general appraisal type.

To any case-method instructor, the importance of his preparation for class is fully apparent. To some of you, it may come as something of a surprise that this task in preparing for a case class is more arduous than that of the students and more arduous also than that of a lecturer.

Case teaching is a highly individualistic art, and the methods and approaches of one instructor seldom can be appropriated by another. Every seasoned instructor develops an approach of his own. Each new instructor has to do likewise, and there are no general rules for him to follow.

In the days that will follow, you will have your chance to be introduced to and participate in the use of this method. Better yet, you should be able to apply it in teaching cooperatives.

I hope you will have a pleasant and fruitful stay on this campus.

Thank you.

###

/sml: 102880

International Cooperative Alliance
Regional Office & Education Centre
for South-East Asia (ICA ROEC)
"Bonow House" 43, Friends Colony
New Delhi-110065 (India)

ICA COOPERATIVE EDUCATION MATERIALS ADVISORY SERVICE (CEMAS)

- Dr. Dharm Vir
Joint Director(Education)

1. In response to a widely-felt need to improve the supply and quality of materials used in cooperative education and training in the developing countries, the Cooperative Education Techniques Project was launched in 1973 by the International Cooperative Alliance (ICA) with the assistance received from the Cooperative League of the USA.

2. The initial task with which the Project was charged was to carry out a survey into educational materials and techniques used in the developing countries with a view to identifying the main areas of action required to improve the existing provision. As a result of this survey, a report was made, recommending interalia, the establishment within the framework of the ICA and its Regional Offices, a Cooperative Education Materials Advisory Service (CEMAS), the functions of which are:

i) to collect materials, and information on materials available to and/or used by cooperative institutions in the developing countries, for the purpose of compiling an inventory of such materials,

ii) to provide advice and information regarding the use and availability of suitable materials to potential users in the developing countries and, where possible, to facilitate the exchange of such materials, and

iii) to produce proto-type materials were special need for such was identified.

3. The round work for the CEMAS operation has been laid in the London office and work on the inventory of materials is well underway. Materials used in connection with cooperative education and training in more than 30 countries have been collected, evaluated and classified according to

......:2/-

quality and the areas of cooperative study to which they are mostly suited. This aspect of the service will continue as an on-going operation, details of other items being added to the inventory as they become available. Information on materials already listed is readily available to cooperative training institutions in developing countries on request.

HOW DOES CEMAS OPERATE : Please see CEMAS CYCLE (Annexe-C)

4. A similar service on a modest scale has also been initiated by the ICA Regional Office & Education Centre for South-East Asia, in 1976 through CEMAS UNIT at New Delhi. Another CEMAS UNIT has been established at the ICA Regional Office for the Central and East Africa at Moshi (Tanzania). The CEMAS UNITS in the Region collaborate with the CEMAS London but work within the framework of their respective Regional Offices.

5. An important function of the CEMAS operation is the production of prototype educational materials on particular subjects where there appears to be specific need for these for cooperative education and training purposes in the developing countries. The production of such proto-type has been commended. A list of educational and training materials produced and distributed by the CEMAS London is enclosed as Annexe-A and these can be procured by <u>actual</u> <u>users</u> by making a specific request. In this connection, one can make initial contact with CEMAS Liaison Officers in their respective countries, and also with the ICA ROEC, New Delhi. A list of Liaison Officers in the Region is enclosed as Annexe-B.

6. As matter of Regional Priority it has been decided to produce management cases, role plays, teachers' manuals, case book on cooperative management, training packages and some audio-visual aids to provide support to cooperative trainers and management training programmes in South-East Asia. Under a special programme of CEMAS, the following materials have been brought out:

i) An Annotated Bibliography on Cooperative Management Cases (mimeographed)

ii) A Case Book on Cooperative Management (mimeographed)

iii) A Catalogue of Films on Cooperative Education & Training (mimeographed)

.......:3/-

iv) A Manual on Role Plays for Cooperative Teachers (under print)

v) A Manual on Training Packages based on Audio-Visual Aids (mimeographed)

Selected audio-visual aids, scripts and specimen of Training Packages on subjects such as Methods and Techniques of Cooperative Education, Farm Extension, Shop Layout and Display, Leakage in Consumers Cooperatives, Marketing of agricultural products, Board-Manager Relations in Cooperatives, Financial Planning and Budgeting in Cooperatives, and other subjects can be seen in the CEMAS Room at the ICA ROEC, New Delhi.

7. The following priced publications on cooperative education and other educational materials are also available through CEMAS UNIT, New Delhi:

i. Manual for Study Circle Leaders

ii. Communication and the Cooperative Teachers

iii. The Cooperative Principles

iv. Economics of Consumer Cooperation (study material)

v. Key to Household Economy (study material)

vi. Balanced Diet (study material)

vii. Book Keeping for Fisheries Cooperatives (study material)

viii. Farming Guidance in the Cooperative Movement in Japan

ix. Cooperative Member Education & Communication (along with case studies on two agl. coops. in Japan)

x. Member Activities in the Japanese Consumer Coop. Movement

xi. Experts' Consultation on Cooperative Member Education (Report and Papers)

xii. A Series of Speeches on Cooperation

In addition, the ICA ROEC had produced some study material and study circle kits as an aid to Cooperative Member Education programmes undertaken by it on a pilot basis in Delhi, and other parts of India. Some useful material was also produced by the ICA/NCUI Field Project in Cooperative Education, Indore. The ICA ROEC also plans to produce some training packages which would be useful for the field workers and organisations

8. A special feature of the CEMAS New Delhi Unit is the ICA Film Library Service. The service, which has been started on an experimental basis for India, will be expanded to other countries of the Region. To meet the widely need of training in the preparation and use of audio-visual aids the Unit has been assisting the member movements in conducting workshops on audio-visual and other modern techniques of education. It also assist in the follow-up teacher participants and other educational activities of the ICA ROEC in South-East Asia.

9. The main priority before the ICA CEMAS London is to produce material which would help in improving cooperative member relations and member education programmes in the developing Regions of the world. It has, therefore, decided to produce a model member education plan and a manual on techniques of preparation of national cooperative education plans. The CEMAS has also initiated conducting of Local Education and Training (LET) Projects in selected parts of Kenya (East Africa).

10. CEMAS New Delhi Unit works within the framework of the ICA ROEC and its activities in the Region are guided by the South-East Asian Specialist Group on Cooperative Training (SEASPECT) and the ICA Council for South-East Asia, which meet at regular intervals and give their valuable advice. A report on the CEMAS activities in the Region hase been issued separately.

....

vn/

Annexe-A

ICA CEMAS, LONDON - PUBLICATIONS LIST (Revised)

METHODS IN COOPERATIVE EDUCATION:		Price per copy £
1.	Participative Teaching Methods A guide with specimen for cooperative teachers, 119 pages, 3rd impression, 1978	1.50
2.	Explaining Annual Reports A guide on the use of annual reports and accounts as an aid to education, 96 pages, 2nd impression, 1979	
3.	Cooperative Education Radio Programmes A general guide with specimen scripts, 123 pages, 4th impression, 1979	1.50
4.	Case Writing Workshop Manual The manual contains material for a two-week course in writing of case studies on cooperative management, including a teacher's guide. By Dr. Malcolm Harper, Caranfield School of Management, 194 pages, 3rd impression, 1980	
5.	Correspondence Education A guide for planners, course writers and tutors with 6 specimen lessons. Guide: 32 pages; specimen lessons 98 pages. Basic text compiled by the International Extension College, Cambridge, 1977	10.00
6.	Member Education - A Campaign Plan for Tinsa Valley A case study, with commentary, on how to plan a member education campaign; for use as a guide and for training purposes, 1980	3.00
7.	Society Operating Manual A guide with specimens on the preparation of operating manuals for agricultural and consumer cooperatives, 145 pages, presented in a ring-binder, 1977	7.00
8.	Basic Control of Assets A manual on the measures to prevent losses in small cooperatives, including teacher's guide, pages 53, 1979	2.50
9.	Cooperative Book-Keeping - Four Manuals A simplified system of book-keeping for use in primary cooperatives of various types	
	i. Marketing Cooperatives — 52 pages	1.50
	ii. Consumer Cooperatives — 40 pages	1.50
	iii. Savings & Credit Cooperatives — 26 pages	1.50
	iv. Industrial Cooperatives — 38 pages	1.50

	MISCELLANEOUS PUBLICATIONS:	Price per copy £
10.	A Co-operator's Dictionary Explanations of cooperative and commercial terms, 55 pages, 1977	1.00
11.	Sources of Cooperative Information Including a list of cooperative contacts in most countries of the world, 1979	1.25
12.	Cooperative Education Directory The Directory in English and French lists institutions engaged in cooperative education and training in developed and developing countries, 114 pages, 1979	2.00
	FORTHCOMING PUBLICATIONS:	
13.	National Cooperative Education Plans A manual on the techniques of preparation of a national long-term cooperative education plan.	
	PUBLISHED IN ASSOCIATION WITH UK COOPERATIVE UNION	
(i)	Co-operative Enterprises By Georges Lasserre. An updated and revised edition of the original French text. The many and varied types and activities of cooperative organisations that exist in the world today are the main theme of this booklet, 1979	0.75
	PUBLISHED IN ASSOCIATION WITH INTERMEDIATE TECHNOLOGY PUBLICATIONS:	
(i)	An Introduction to Cooperatives A programmed learning text by T.N. Bottomley 67 pages, 1979	2.95
(ii)	Cooperative Organisation - An Introduction A description of what cooperatives are, how they are organised and what they can do by B.A. Youngjohns, 34 pages, 1977	1.25
(iii)	The Work of a Cooperative Committee A programme learning text by P. Yeo, 87 pages, 1978	2.25
(iv)	Business Arithmetic for Cooperative and Other Small Businesses For use by cooperative society managers and staff, By T.N. Bottomley, 87 pages, 1978	1.95
(v)	Tropical Agriculture for the Staff of Cooperatives A programmed learning text by P. Yeo, 54 pages, 1977	1.95

Annexe-B

LIST OF LIAISON OFFICERS

1. Mr. Abdul Razak Khalaf
Vice Principal
Cooperative Training Institute
c/o PACCA Project
U.N.D.P.
P.O. Box 5
Kabul (Afghanistan)

2. Mr. A.K.M. Zahirul Haque
Chief Executive Officer
Bangladesh Jatiya Samabaya Union
9-D, Motijheel Commercial Area
Dacca (Bangladesh)

3. Mr. V.N. Pandya
Principal
National Centre for Cooperative Education
3, Siri Institutional Area
Behind Hauz Khas
New Delhi - 110016 (India)

4. Mr. P.S. Parmar
Lecturer
National Centre for Coop. Education
3, Siri Institutional Area
Behind Hauz Khas
New Delhi - 110016 (India)

5. Dr. S.C. Mehta
Professor
Vaikunth Mehta National Institute of Cooperative Management
Ganeshkhind Road
Pune - 411 016 (India)

6. Mr. Bachcki
Departemen Perdagangan Dan Koperasi
Direktorat Jenderal Koperasi
Jalen Jen. Gatot Subroto
Jakarta (Indonesia)

7. Mr. Takashi Furukawa
Institute for the Development of Agricultural Cooperation in Asia
24-9, 6-chome, Funabashi,
Setagaya-ku,
Tokyo 156 (Japan)

8. Mr. A. Siva Perumal
Secretary, Edu. & Research
Cooperative Union of Malaysia
WISMA MCIS, Jalan Barat
Peti Surat 345
Petaling Jaya (Malaysia)

9. Mr. C. Sivalingam
Cooperative Central Bank Ltd.
29, Leboh Ampang
P.O. Box 685
Kuala Lumpur (Malaysia)

10. Mr. Supah Noh
Cooperative College of Malaysia
103, Jalan Templer
Peti Surat 60
Petaling Jaya (Malaysia)

11. Prof. Hwan Kyou Lee
Training Institute
38-27, Wondang-Ri, Wondang-Eup
Kyong-Kun, Kyongki-Province
Seoul (Rep. of Korea)

12. Mr. Surya Ratna Shakya
Ag. Principal
Cooperative Training Centre
Arniko Raj Marg, Baneshwor
Kathmandu (Nepal)

13. Mr. Florencio S. Corral
Assistant General Manager
Cooperative Insurance System of the Philippines, Inc.
300 de la Merced (Delta) Bldg.
West Avenue, Quezon City (Philippines)

14. Ms. Constancia J. Caballero
Auditing Consultant
Agricultural Credit & Coops. Institute
University of Philippines at Los Banos
College, LAGUNA (Philippines)

15. Mr. Alonso I. Pinlac
Chief, Edu. & Training Division
Bureau of Cooperative Developme
(Ministry of Local Govt. &
Community Development)
4th Floor, Ablaza Bldg.,
117-E, Radriguez Sr., Ave.
Quezon City (Philippines)

16. Mr. Jamil Aslam
Principal
Cooperativ Training College
N.W.F.P., Kohat Road
Peshawar (Pakistan)

17. Mr. M.G. Siriwardena
Staff Officer
National Cooperative Council
455, Galle Road
Colombo - 3 (Sri Lanka)

18. Mr. M.D.K. Goonaratne
Documentation Officer
Cooperative Management Services Centre
Coop. Square, 127, Grandpass Road
Colombo - 14 (Sri Lanka)

19. Mr. G. Amoganathan
c/o UNIT 5419, 3rd Floor
Golden Mile Shopping Centre
Beach Road
Singapore - 0719

20. Mr. Sithorn Nikrotha
Chief of Foreign Relations Section
Cooperative League of Thailand
4, Pichai Road, Dusit
Bangkok (Thailand)

21. Miss Somjit Thongdoung
Department of Coop. Promotion
Ministry of Agriculture & Coops.
4, Pichai Road, Dusit
Bangkok (Thailand)

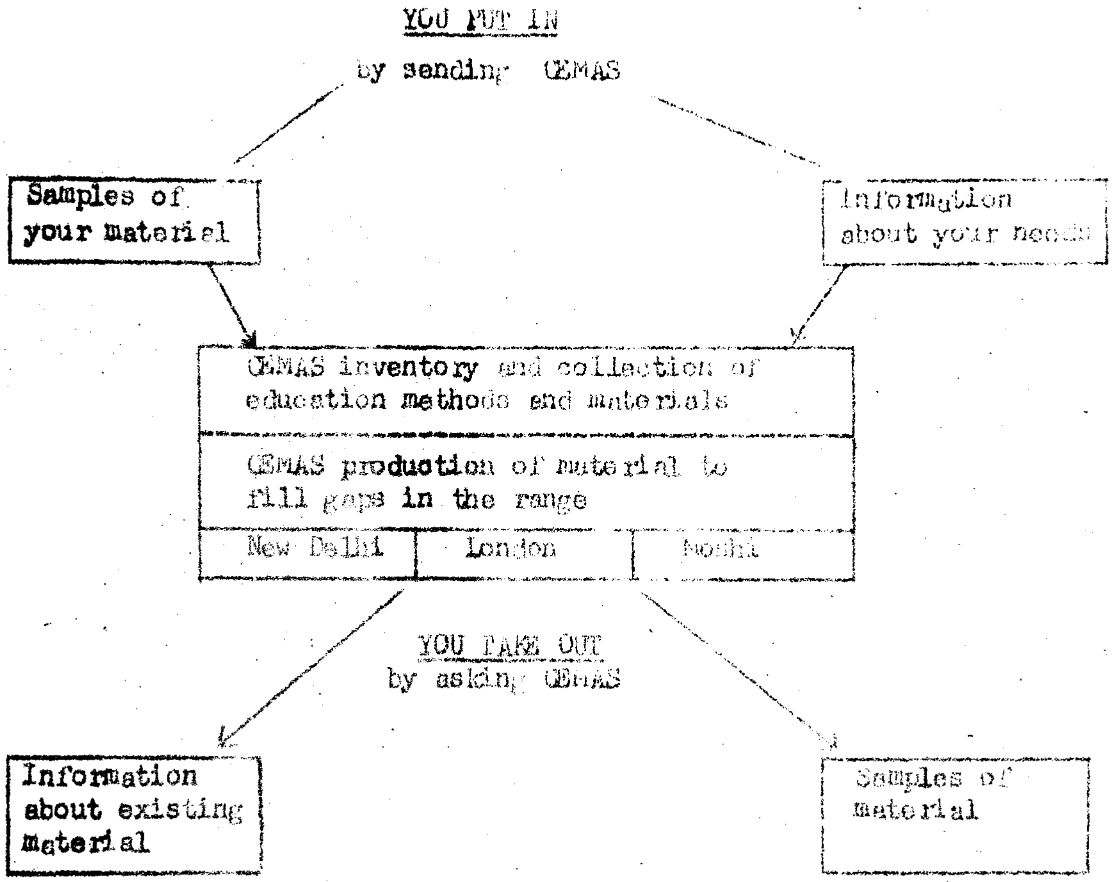
....

vn/

Annexe - C

(CEMAS CIRCLE)

1. HOW DOES CEMAS OPERATE AS A CLEARING HOUSE FOR COOPERATIVE EDUCATION METHODS AND MATERIALS?



2. Who are our clients?

Answer: All organisations and institutions concerned with cooperative education, training and information.

THE COMMUNICATION PROCESS

INTRODUCTION

When we say that we will look at the communication process, we mean that we want to examine the necessary ingredients for interaction among people. We must look at the factors which have to be taken into account, and how these factors operate. We are concerned with improving our understanding of the communication process. We also are concerned with improving our ability to be understood--and to understand others. These are the values in studying the communication process.

What are the factors, or elements, that have to be examined? Aristotle said that we have to look at three things: the speaker, the speech, and the audience. He meant that each of these elements is vital to communication--- and that we can organize our study of the process under the headings of (1) the person who talks, (2) what he says, and (3) the persons who listen.

This kind of way of looking at communication has persisted. In 1947, Claude Shannon, a mathematician, and Warren Weaver, an electrical engineer, presented a model of how communication works in a telephone system--or any other electronic system. They said that the factors in communication are (1) a source, (2) a transmitter, (3) a message, (4) a receiver, and (5) a destination. This model is very similar to the earlier one by Aristotle, although it does add two extra functions - which we will talk about later.

FACTORS IN A COMMUNICATION MODEL

The following factors might well be considered in any study of the communication process.

I. The source(S)

A. All communication must come from some source

1. This source might be one person.
2. This source might be a group of people -- even an institution.

B. There are things which determine how the source will operate in communication process.

1. His communication skills: the ability to think, to write, to draw, to speak, etc.
2. His attitudes toward:
   a. his audience
   b. the subject on which he is communicating
   c. himself
   d. any other factor which is pertinent to the communication situation
3. His knowledge about:
   a. his subject
   b. his audience

4. The social system in which he operates:
    a. Who his friends are
    b. What his role is
    c. What groups he belongs to
    d. What his social background is

In the communication process, then, we begin with a source--someone who starts things going even though we must remember that many things condition how the source will communicate. It can profit us to examine ourselves as sources of communication--and to evaluate communication that we received in light of what we know about the source.

II. The Message (M)

A. The message in communication has several sub-factors which have to be considered.

1. The code has to be chosen.

    a. This can be looked at in terms of a given language
        1) These include the natural languages: English, Spanish, Chinese, Pilipino, etc.
        2) These include other kinds of languages: music, art, gestures, etc.
    b. This can be looked at in terms of a level of difficulty of the code for the audience.

2. The content has to be selected and organized.
    a. Ideas to be presented have to be isolated.
    b. Ideas have to be tested.
    c. Support has to be selected and tested.
    d. The ideas and support have to be arranged.

3. Some treatment of the message has to be determined
    a. What things should be selected for a given audience?
    b. How can these things best be presented for a given audience?

B. Within each sub-factor, two things have to be considered.

1. The elements of code, content, and treatment.
2. The way in which the elements are structured--or arranged.

When a particular source has created a message, he has to decide what channel he will use to present this message; i.e., what medium (or media) of communication will be most effective.

III. The Channel (C)

A. There are many ways that we can look at channels. Perhaps the simplest is to list the five senses that can be used to receive a message. In other words, the channels of communication are ways of presenting a message so that

1. The message can be seen.
2. " " " " heard.
3. " " " " touched.

4. The message can be smelled.
5. The message can be tasted.

B. Each of the following broader kinds of channels can be analyzed under the five senses.

1. public speech, discussion, interviewing
2. radio, recording
3. television, motion pictures
4. demonstration, on-job-training
5. newspapers, magazines, books

C. Generally, communication is more effective when more channels are used (i.e., when more senses are stimulated).

D. Generally, communication is more effective when the senses are stimulated more directly and immediately.

E. As channel intensity and number go up, the potential audience size usually goes down. In other words, we might suggest, as a general rule (with many exceptions) that multiple channels, with high intensity, produces maximum effect -- on fewer persons. A single channel, with low intensity, produces minimum effect--on much larger groups of people.

IV. The Receiver (R)

The final link in the communication process is the receiver--the person or persons on the other end of the process from the source. All of the factors that operate on the source operate equally on the receiver.

A. All communication must end with some receiver.

1. This receiver might be one person
2. This receiver might be a group of people--even an institution.

B. There are things which determine how the receiver will operate in the communication process.

1. His communication skills.
2. His attitudes.
3. His knowledge.
4. The social system in which he operates.

We might summarize our discussion by a sentence listing the factors that we have to consider in understanding the communication proces. Here is the sentence.

WHO (source), for what reasons, says WHAT (message), in what way, over what CHANNELS, to what audience (RECEIVER), with what effects (reaching the goals of the source).

# # #

October 13, 1980
ldg/

3½

SESSION - 5

PSYCHOLOGY AND MANAGEMENT OF ADULT LEARNING

by

Dr. Dharm Vir

Jointly supervised by

INTERNATIONAL COOPERATIVE ALLIANCE
Regional Office & Education Centre
for South-East Asia
"Bonow House" 43, Friends Colony,
NEW DELHI - 110 005

PSYCHOLOGY AND MANAGEMENT OF ADULT LEARNING

Human Development:

After birth, a human being passes through different stages of development viz. infancy, childhood, adolescence, adulthood and old age. He is born with some characteristics and potentialities comes under the influence of environmental and cultural factors and it is also effected by maturation and learning processes. So, an array of factors affects human development. During the adulthood some of these effects get stabilised and others continue to change his personality, thus making each individual unique.

The educators are expected to take the constant factors into account and systematically change the variable factors in the desired directions. For example, they have to assess the existing levels of adult understandings, intelligence, abilities, interests and develop programmes for development of useful knowledge, skills and attitudes.

The main aim of educating adults is to develop their personality in a balanced manner, so that they adjust themselves better in their environment and whenever necessary make changes in their environment. Cooperative educators accept the hard fact of competitive society and prepare cooperators to face challenges of free economy. They also aspire to develop such leaders and managers who would help in the establishment of new social and economic order.

In specific terms, objectives of adult education are to bring, by formal or informal means, relatively permanent changes in the following aspects of learner's personality:

i) knowledge and understandings
ii) attitudes and interests
iii) skills and habits, abilities and aptitudes
iv) values and appreciations
v) thinking: creative, objective or critical

A person is motivated to do something to satisfy his needs, interests and desired goals. Learning processes are accelerated when adults are motivated to achieve goals they set before themselves. Incentives can further accelerate the process of learning but the intrinsic interest is most important for self-growth and learning. Human needs and wants can be divided into the following categories:

1) security needs, such as safety.
2) physiological needs, viz. hunger thirty, sex etc.
3) social needs, sense of cooperation, belonging, prestige, importance.
4) psychological needs, sense of achievement, desire for self-fulfillment.

An individual gets interested in a thing, activity or thought whenever one or more of above needs are satisfied by paying attention to and getting involved in relevant phenomenon. Some interests develop because of maturation process. It means that some sources of motivation are intrinsic or hereditores and others are extrinsic or environmental.

Sometimes, frustrations occur when adults fail to achieve the desired goals. These frustrations can be expressed by them in several ways, viz. withdrawal, repression, fixation, aggression, rationalisation, sublimation or self-evaluation and improved efforts. In management education, ability to overcome frustrations and to think objectively and have sound judgement is considered most important. The adult learners are also expected to acquire skills in decision-making and problem-solving.

<u>Some characteristics of Adults Learners</u>

1. Adult learners already have acquired some knowledge general and specific abilities; interest, attitudes, prejudices, habits, values and different levels of emotional maturity.

2. They also acquire some knowledge, skills and experience by learning and working in different kinds of environment.

3. Previous experience may hinder or help in the learning proces .

4. There are <u>individual differences</u> among adults in terms of rat and quality of learning.

5. Motivation for educating adults may be based on intrinsic and extrinsic factors.

6. Adults have many responsibilities, viz. in work place, at home and in the society. They have limited time, energy and money.

7. They would like to be involved in the planning, implementation and evaluation of educational process.

8. Without immediate reinforcement and practice the learners tend to forget the lessons learnt.

9. Adults, specially female and older adults are generally shy and get apathetic if proper attention is not given to them.

10. With advancement of age (about 40 years) there may be slowing down in learning psycho-motor skills but many adults become more active in acquiring social and linguistic skills and pursue similar spiritual interests.

11. Individual adults would need assistance in the transfer of learning to job situation.

12. Education through small group facilitates individual learning process, improves interpersonal relations and communication. It also develops team spirit and leadership qualities.

SOME PRINCIPLES OF LEARNING

1. The trainee learns what he does. In practice, this principle directs the trainer to arrange the conditions of learning in a way that will enable the trainee to make the correct responses early in the learning situation.

2. Learning proceeds most effectively when the trainee's correct responses are immediately reinforced. The evidence shows that the use of reward for correct responses and non-reward for incorrect responses is more effective than the use of punishment.

3. The frequency with which a response is reinforced will determine how well the response will be learned. The evidence shows that in general it is best to use a continuous schedule early in training and then to shift gradually to some form of intermittent schedule in order to maintain the response at a high strength.

4. Practice in a variety of setting will increase the range of situations in which the learning can be applied. Furthermore such varied practice will make the trainee more resistant to forgetting.

5. Motivational conditions influence the effectiveness of reward and play a key role in determining the performance of learned behaviour.

6. Meaningful learning, that is learning with understanding, is more permanent and more transferable than rote learning or learning by some memorised formula.

7. The trainee's perception of what he is learning determines how well and how quickly he will learn.

There are many ways to attract the trainee's attention to important stimuli. The problem is usually not one of finding a way; the problem is usually one of recognizing that the important stimuli must be perceived correctly if learning is to proceed.

8. Trainees learn more effectively when they learn at their own pace.

9. There are different kinds of learning and they may require different training processes.

SUGGESTIONS FOR ADULT EDUCATORS

1. Assess the existing level of learner's knowledge, needs and interests. Learn about their attitudes, prejudices, skills, habits and previous experiences in relevant areas.

2. In the light of above assessment set goals and objectives for educational programme. It is necessary to plan, implement and evaluate the programme in consultation with the learners. It will be more effective to involve them actively.

3. The learning process should be related to the previous experience. Remove prejudices and other barriers in the way of learning.

4. Arrange situation condusive to learning. Motivation for learners should be relevant and adequate in terms of their needs and may be intrinic or extrinsic.

5. Communication of new information and ideas should be at the level of their reception, skill may be imparted through demonstration and practical work.

6. Use of participative and group methods should be preferred in order to promote learning and develop leadership qualities.

7, Arrange for self-effort in learning and re-inforce the lessons learnt.

8. Make provision for periodical evaluation and follow-up

9. Divide learners in manageable and homogenous groups. Never-theless give due attention to individual differences in learner's personality.

10. Avoid fatigue, and punishment for mistakes. Give due recognition to progress in learning.

CONCLUSIONS

Although, there are several theories on learning, the commonly accepted principles of adult learning can be summarized as follows:

1. Adult trainee must learn for <u>himself</u>, no one can learn for him.

2. Each trainee learns at his own pace, and for any age group there are considerable variations in <u>rates of learning</u>.

3. A trainee learns more when each step is immediately strengthened or re-inforced.

4. Full, rather than partial, mastery of each step makes total learning more meaningful.

5. A trainee is more highly motivated when given responsibility for his own learning; he learns and retains more.

6. Treated as a group, trainees learn from each other.

A trainer can either manage learning resource or he can operate as a resource. A training manager should have the following functions in cooperative training situation: Planning, Organising, Leading and Controlling. While working as a teaching resource he should motivate, reinforce, get feedback, involve and encourage practice and transfer learning to other real situation.

SELECTED REFERENCES

1. Bigge, M. L. - Learning Theories For Teachers. New York: Herper and Row Publishers, Inc. 1964.

2. Craig, R. L. and Bittle, L. R. - Training and Development Hand Book (Chapters 2 - 3), New York, McGraw Hill, 1967.

3. I.C.A. Education and Voluntary Movements. New Delhi, ICA ROEC, 1965. (Chapter on Need and Aim of Cooperative Education)

4. ILO - (Management Development Manual 36) An Introductory Course in Teaching and Training Methods for Management Development. Geneva ILO, 1977. (Chapter 19/Designing Training Programmes)

5. Lyton, R. P. and Pareek, U. - Training and Development. Homenpal Illinois: Richard D. Irwin, Inc, 1967.

6. Vir. D. - Manual for Study Circle Leaders, New Delhi, ICA, Ro and EC, 1975. (Chapter VIII, Some Techniques of Group Development)

SESSION 6

NATIONAL COURSE

IN

TRAINING METHODOLOGY AND TECHNIQUES

6th Oct. to 5th Nov. 1980

ACCI, U.P.L.B.

Philippines

THE AIMS AND METHODS OF COOPERATIVE EDUCATION

by

Dr. Dharm Vir

Jointly Organised by

INTERNATIONAL COOPERATIVE ALLIANCE
Regional Office & Education Centre
for South-East Asia
"Bonow House" 43, Friends Colony,
NEW DELHI - 110 005

ACCI/BCOD
Philippines

THE AIMS & METHODS OF COOPERATIVE EDUCATION

Dr. Dharm Vir

I. INTRODUCTION

The overall aim of cooperative education may be to change knowledge, skills, attitudes and behaviour of cooperative personnel (both employed and non employed or elected) in such a way that they together contribute to improvement in the business of their cooperatives and thus to their own socio-economic standards. This can best be achieved through done if they have proper understanding of cooperative principles and practices. Cooperative education programmes therefore includes besides training in management and technical skills, broad understanding and appreciation of cooperative philosophy and objectives. The vocational and technical skills are imparted according to the needs of various categories of personnel and objectives a specific programme.

The methods of cooperative education can be meaningfully discussed only with reference to the audiences. The two main types of audiences are the members and the employees. In addition to these two major audiences, education programmes may have to be directed at potential members in order to expand the area of influence of the cooperative movement. The sympathy and support of the social groups, such as youth, women and personnel working in the government development departments, could also be important for ensuring a coordinated development of the movement.

We will divide the paper into two parts dealing with educationa methods for members, and methods of training for the employees in the cooperative movement. Wherever possible, reference will be made to the methods suitable for social groups outside the cooperative movement.

I.I. Choice of Method

It should be mentioned that no single method would generally serve the purpose in an education programme for any particular group of people in the cooperative movement. It will be necessary to use several educational methods together in order to produce the desired impact. Availability of organisational support and resources will also affect choice of methods.

The considerations important in the choice of education methods for any particular group are the objectives of the education programme, the subjectmatter to be taught, and the academic background and cooperative experience of the participants. For instance, if an education programme is being formulated with the aim of organizing cooperative societies, the methods suitable may be the organisation of promotional meetings and group study by the potential members. At the promotional meetings, the extension worker will try to interest potential members in the cooperative movement and will discuss with them the principles of Cooperation, the advantages of cooperatives, and the technique of organising them. The potential members may then study the usefulness of a cooperative society in the context of their own problems, together with the techniques of its organisation.

I.II <u>Audience in the Cooperative Movement</u>
The nature of an audience will have a great bearing on the selection of education methods. Any analysis of members and employees in the movement for education purposes should be with regard to their functions and responsibilities in their respective cooperatives. The members of cooperatives may be classified in the following groups:

1. General
2. Elite members and managing committee members
3. Office-bearers

The term elite members may be understood to mean those members of the cooperative societies who are actively interested in the work on the society and who, given proper training, would be potential leaders. A broad classification of cooperative employees may be as follows:

1. Junior personnel
2. Intermediate personnel
3. Senior managerial personnel

Social groups, outside the cooperative movement but interested in education programmes, may be classified as follows:

1. Those persons who are not in the cooperative movement, but who may be willing to join cooperatives.
2. Important social groups, such as youth and women.
3. Personnel working in the government departments.
4. Leaders in the local self-governing institutions.

II. EDUCATIONAL METHODS FOR MEMBERS

In this section, we will deal with techniques for ordinary members and elite members. The techniques for elite members will be applicable to managing committee members as office bearers.

II.I <u>Techniques for Ordinary Members</u>
The general body meeting provides an excellent opportunity for the members to learn about their cooperative society and the various aspects connected with it. At these meetings, the annual report is discussed and the broad policy of the society is defined. However, the general body meetings of cooperative societies are not usually well-attended and special efforts should be made to increase member attendance.

Frequent membership meetings may be organised; these need to be made attractive by arranging additional recreational and social programmes.

Mass Media

Mass media mainly include radio, films and TV. Although a large number of people can be contacted through these channels, there are certain limitations. It has been found in Great Britain and the USA that mass media "typically reinforce or activate existing values and attitudes, only very rarely alter them, and scarcely ever form or originate them". Thus, the educational influence of mass media may be superficial unless they are used in a well-designed educational programme as for example in group discussions.

Cooperative Publications

Newspaper, magazines and publications are the carriers of knowledge and can exert a great influence on the masses. The cooperative movement can utilize newspapers to provide both members and the general public with information on its ideology, achievements and problems. If the newspapers brought out by other agencies are to be effectively used by the movement, the apex cooperative organisations should develop relations with the general press and feed them with articles, news-stories and other useful information.

The cooperative unions in advanced cooperative movements bring out magazines for members and also publications on socio-economic conditions and the cooperative movement. The family magazines viz., 'Vi' and 'Ie-no-Hikari' of the Swedish and Japanese Cooperative Movements respectively are good examples among such publications. These journals deal not only with matters concerning Cooperation but include articles of general interest such as short stories, pictorial pages and children's comics. The advanced movements also bring out specialized periodicals for various categories of personnel, such as the board of directors, managers and accountants.

The building up of library and reading room facilities by various cooperative societies for their members is another instrument through which education can be carried to the members. The pioneering Rochdale Society, as is well known, placed special emphasis on building up a library and providing quiet reading facilities to the members. It should be mentioned, however, that the efficacy of printed material in the Region would be restricted on account of widespread illiteracy.

II.II Techniques for Elite Members

Particular attention should be given to the "elite" members in cooperative educational programmes for several reasons; firstly, elite members are elected potential source from which managing committee members will be elected. Secondly, they will usually take the lead in discussions and help in arriving at decisions at general body meetings. Finally, knowledge imparted to the elite members is likely to be passed on to fellow members in informal meetings between the two, since the former take more active part in community life.

Demonstration and Exhibitions

Demonstration can be arranged inside the classroom and in the field. Members would believe a fact which they have seen and if possible handled themselves. We can use a real house or farm for demonstration of the efficacy of a particular technique. Some time use of a particular commodity can be demonstrated with some good results.

Extension workers also use models, prototypes, pictures or charts and arrange a display of relevant materials to activate their objectives. Whenever possible an exhibition of materials and methods can be arranged at asuitable place and the learners can be involved in arranging the same.

Study Circle and the correspondence Course Methods

The study circle method, which has yielded very good results in the Scandinavian countries and other advanced movements in the West, is particularly suitable for the elite members, the members of managing committees, office-bearers and junior employees. The method is useful in informing the above groups of members about the activities and the current problems of cooperative movements and in providing them with necessary education for developing leadership qualities. Anorther variant of this method is the group discussion method wherein discussion sheets are used instead of the study material. The discussion group and the study circles can also be organised with the help of films, radio broadcasts, TV programmes and specially produced study materials. The study circle method, as practised in Sweden, is mainly based on individual reading of specially prepared study material, group discussion on the questions contained in the material under the guidance of trained leaders, and correspondence with teachers working at the central organisation. The method is being used effectively by the Swedish Cooperative Union and Wholesale Society (KF), the Correspondence Course Institute not only for member education but for the education of cooperative employees as well.

Project Method

Under this method, the group carries out a project of local significance, such as the construction of a road or a warehouse required for the co-operative society. Members' participation in an activity of this kind, under the aegis of the cooperative society, increases the sense of member participation and often leads to pride of achievement among members.

Seminars and Conferences

The seminar is an educational technique based on the active participation of members in discussions on the subject under study. There are two ways in which seminars can be conducted. One way is to include in the seminar programme lectures from specialists, group discussions on selected questions, and plenary meetings to discuss group reports and the report of the seminar as a whole. Documentation may include selected readings, and papers prepared by the lectures, on the subject under study.

The other method is to divide the participants on the basis of their specialisation into two or three discussion groups, after a general introduction on the scope and methods of the seminar. The sponsoring organisation may prepare agenda notes on the topics included in the seminar programme, and indicate, among other things, points for discussions in the agenda notes. The agenda can be split up into two or three parts and each assigned to different working groups for discussions after the groups have prepared the reports. In both these forms, field visits may be included in the seminar programmes.

The first method of conducting the seminar is likely to give better educational results than the second, because of the use of expertise. A similar technique can be used in the training courses for employees as well. The mechanics of the seminar in the second form approximate those of the conference. It calls for much greater knowledge and experience on the part of the participants than the first method.

The practice of holding week-end seminars for the leaders of the primary societies is widely used by the advanced movements. The seminar technique can also be used with great advantage for leaders at the secondary levels. In some cases the seminars are called conferences in order to lend them a status and make them more attractive. However conferences which are more formal and pragmatic, can also be used for educational purposes.

Study Tour

The cooperative movement has extensive use of this technique for the education of its members, leaders and employees. Members in a particular locality may be taken to see the working of a successful cooperative society in a neighbouring area and to observe for themselves the methods and practices followed by it. Study tours are also arranged internationally for leading co-operators of one country to study the organisational structure and operational techniques of cooperative movements in other countries. It is essential to plan the study tours thoroughly; otherwise they are likely to degenerate into sight-seeing excursions.

Training Courses

Some cooperative movements in South-East Asia organise short training courses camps of the duration of two to three days for ordinary members and one or two-week courses for managing committee members. Such courses are generally organised in the members' localities and in the evenings when members have leisure time. The instructors go from place to place organising these courses.

The experience of several countries of South East Asia in this field indicates that it is not possible to provide continuous education to the ordinary members through the training course method. Further, while the costs involved in conducting training courses are high, the effect of the method so far as ordinary members are concerned is not great. It would, therefore, appear that an intensive education method, such as the training course, should be used mainly for the office-bearers and employees.

II.III Resume

Cooperative education should be need oriented broadly based so that interested public and the membership as a whole gain increased knowledge and provides support to the elected leaders in their societies. Further, a selective approach would be necessary, whereby the movement concentrates its educational activities on the elite members, a potential source of leadership, and elected members to equip them for the effective discharge of their duties in the societies. Finally, cooperative education methods should be such in which democratic procedures are used so that the members receive training in parliamentary procedures during the study programme.

III. METHODS OF EMPLOYEE TRAINING

We will describe below the training methods with reference to the employees within the cooperative movement as a whole. A judicious combination of several methods with varying emphasis may be necessary with reference to the different types of employees. An important consideration to be kept in view in formulating the training programmes for the employees is that these junior employees, who have shown ability and who are willing to put in the necessary effort for education, should be able to assume more responsible positions through participation in courses at successively higher levels. Thus, while the elementary training courses for the junior employees may emphasize on-the-job training and practical work, they should also give the trainees some knowledge of the principles and structure of the cooperative movement.

III.I Training Course

The most common system of training is the organisation of training courses. Quite often the movements in the developing countries are tempted to look to the universities for guidance in formulating the syllabi, and for deciding upon the training methods for the employees. However, the objectives of training programmes for cooperative employees are not necessarily the same as in the case of university education. The objectives of training programmes for cooperative employees are not necessarily the same as in the case of university education. The objectives of cooperative training are the development of skills among personnel in the performance of their specific tasks, together with the fostering of initiative and competence for analysis of problems as they arise.

III.II Lectures

The traditional lecture method, in spite of many limitations, will naturally have a place in any education system. Lectures are useful for presenting study material from a variety of sources to trainees in a systematic form; they also help students understand the various view points on a particular problem or the implications of differing given situations. The teacher can open up new vistas of thought among his students through his wide-ranging knowledge and stimulate thinking on their part by well-directed reading.

It has been recognised that the work of the teacher can be made more explicit and interesting through the use of audio-visual aids. The teacher may use various teaching aids and demonstration material, such as the blackboard, maps, charts and film-strips. In a practical subject like Cooperation, the need for the use of audio-visual aids cannot be overemphasized. For instance, a teacher, who is trying to explain the stocking of goods in a consumer cooperative shop, can do it more effectively through the use of slides showing arrangements of goods in a successful or a model shop.

Further, the lecture can be made more effective by turning it into a discussion between the students and the lecturer. After giving short exposition of about 10 to 12 minutes, the teacher may pose leading questions and involve the students in carrying the discussion further. The teacher may also use the last few minutes of his lecture period for ascertaining the extent to which the students have grasped the subject and for indicating the reading material.

III. III <u>Group Discussion Method</u>

The group discussion technique has already been described with reference to member education. In order to make group discussions effective in the training courses, it would be useful if the teacher suggests reading assignments to the trainees a few days prior to the discussion and asks them to read the relevant material before coming for the group meeting. The training class, if it is large, may be divided into several small discussion groups and the discussion carried out under the guidance of the abler pupils. Through this method, the trainees will learn parliamentary procedures so essential for the work in a cooperative society and will develop power of expression and confidence. The participation in group discussions may help the trainees to locate certain points in the lectures which they have not clearly understood and which they could later check with the teacher.

III. IV <u>Practical Training</u>

Practical training should acquaint the students in detail with the work of cooperative societies by creating an understanding of their problems, developing practical skills for specific jobs and training the students in locating and solving the problems. The main methods of practical training are outlined below:

<u>Workshops</u>

Workshop is more elaborate form of practical assignments or projects, in which a group of participants work together on some practical or productive assignments and thus acquire relevant skills application of knowledge and new made of behaviour. For example, in a workshop of teachers the participants may be divided in to small groups and assigned the task of developing the curriculum for a course, designing a management training programme or preparing audiovisual aids for their use in the class, with the assistance and resources available from organisers managers.

Although a workshop requires much preparation on the part of trainers and expenses by the organisers, it has been found very effective method of cooperative education specially for trainers training.

The products of materials produced and used during the workshop can be tested in the field and circulated on a wider scale, after suitable modification.

Practical Assignments Projects

The trainees could be given practical assignments depending upon the aims to be achieved in their training. For instance, the shop assistants in a consumers' cooperative shop may be asked to handle the customers and the necessary weighing machines. The senior executives being trained for managerial tasks, may be given assignments involving specific problems, such as analysing the capital problems of a society and suggesting measures to develop funds for achieving efficient operations. The trainee may be assigned a responsibility to do the suggested reading and to prepare a paper on a particular subject. The paper can then be discussed in a seminar between the teacher and the trainees concerned. The discussion may be carried out in such a manner that it will stimulate and provoke discussion. Such a system will develop in the students faculties of independent study and thought together with a capacity for critical analysis and for expressing their ideas.

Study Visits

The trainees may be taken to visit various primary and secondary cooperative institutions in the field of their study to familiarize them with the organisational structure and activities of cooperatives and to give them an opportunity to discuss problems with the leaders and officers of cooperative societies. Some precautions are necessary in order to make the study visits fruitful. First, the students should be given broad idea about the society to be visited and then they should be asked to formulate questions through further information could be collected by them. Secondly, the number of trainees to be taken to an institution should not be very large. Thirdly, a trained guide or a lecturer may accompany the trainees so that the programme is conducted on proper lines. However, the study visits have some limitations. They can be too hurried and so may give only a superficial view to the trainees since not much can be spent at each society.

Participation in the Work of Cooperatives

The trainees should be attached to a cooperative institution for a fixed period of time to carry out certain duties under the guidance of an officer of the society. The tasks that may be assigned to them should be similar to those they will be called upon to perform later in a similar institution.

Such on-the-job training is useful for the purpose of developing skills among the trainees and for informing them about the typical problems they are likely to face in their work. It would also enable the trainee to study much more closely the organisational set-up and the operational practices followed. However, this kind of training demands considerable attention and time from the officer of the society to whom a trainee is attached. The officer should have a sympathetic understanding of the trainee's problems and should be aware of his own contribution towards the training of cooperative personnel. Quite often an officer immersed in his daily tasks, may be unable to give the trainee undivided or adequate attention. Such a situation considerable diminishes the value of on-the-job training.

Further on-the-job training is likely to turn out to be purely procedural unless adequate care is taken to see that the student comes in touch with the day-to-day problems of the cooperative society and the manner in which these problems are dealt with. In order to achieve this object, they should be attached to senior officers and even associated in the preparation of the agenda papers for meetings and reports on various problems and projects, as also with the deliberations of the managing committee.

Case Studies

In physical sciences, the student acquires practical knowledge by carrying on experiments in the laboratory. In the social sciences the laboratory is the society or organisation in which the student must study life situations in order to acquire first hand knowledge. This applies to the cooperative movement also.

Typical case studies and research are important tools of practical training since they give students an insight into the problems of the cooperatives and train them in methods of collecting and analyzing relevant information. The students may also develop judgement, since they will be asked to suggest approaches to deal with the problems studied by them. From the point of view of training the students' minds, developing their critical faculties and the ability to deal with actual life situations, the case study method is likely to be of great value.

Recent trend in cooperative management training as the increasing use of different kinds of problem oriented case studies such as management case, in-basket exercises etc. A management case study is a written or documented description of an actual situation where it is necessary for learners to identify the main management problem, to state alternative solutions and to decide what should actually be done by the manager in the situation described.

Role Playing

Definition prepared at the United Nations Institute for Training and Research (UNITAR) in 1970. "Role playing is a training technique in which participants in persons assume an identity other than their own to cope with real or hypothetical problems in human relations and other areas".

The role-fitting and role-taking are other terms some-times used to describe this technique. There is an element of play in the process but the role playing is not a drama, However, it can be interesting, involving and a good fun.

Role playing is another participative technique being used frequently by cooperative trainers. In a role play, the learner actually takes decisions and implement them is simulated situations. However, the trainers need special skills in handling role plays, as attitudinal changes and interpersonal relation in a group are involved.

1. Discuss advantages of various methods and suggest most suitable combination of methods for number education compo in Thailand.
2. Which is the most suitable technique for changing attitudes.

oo 00 oo

(Extracts from "A Case Writing Manual on Cooperative Management" published by the ICA-CEMAS London).

Case Method in Management Training

There is marked difference between the knowledge of a management technique and the ability as a management skill. The upgrading of theoretical knowledge of management technique does not present a major problem. It is the skills of effective practical application of management techniques to live situations which are really a major problem. In other words, apart from the knowledge of management techniques, one of the fundamental tasks of a manager is to make decisions and implement decisions. In the real life situation, the decisions taken by a manager are generally based on various facts and other information as may be available to him. However, in most cases, a manager does not have access to unlimited information and he has to use his judgment to make decision on incomplete information and under conditions of uncertainty. One of the major objectives of Management training and education therefore is to improve the ability of manager to take wise decisions and make plan for their successful implementation. This is precisely what the case method in management education aims to do. The prime purpose of the case method is to help students develop their skills in discovering and defining the vital questions that need to be answered and then to learn how to set about finally the answers. The assumption is that the trainee can best attain managerial understanding and competence through the study, contemplation and discussion of actual situations. The case method could thus be defined as a problem solving exercise in a written form of an actual management situation where it is necessary for trainees to identify the problem to state the alternative solutions and to decide what actually should be done by a manager in the situation described.

As different from a research case study or success story of a cooperative or other organisation, management case is a written or otherwise documented description of an actual management situation. A trainer thus tries to bring the field situation to the class room through the case method.

The case study may again 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.

Historic Development: The classic experts in the field of business administration believed that it was impossible to teach management since it was an art which could only be learnt on the job as opposed to a science which could be learned in the class room or laboratory. However, during the early part of the twentieth century the pioneers of management education at the Harvard Business School in the U.S.A. studied in detail the method of learning adopted in other discipline, particularly of teaching methods in medicine and Law.

In the teaching of medicine it was observed that much of medicine is taught by studying cases; in teaching hospital, medical students examine actual patients or 'cases' and decide what is the diagnosis and what should be the cure.

The patient is protected from what may be their mistakes by the teacher/ doctor who comments upon and corrects their diagnosis and remedies and re-commends what he believes to be the correct diagnosis and remedy.

51

In the teaching of Law they found that much legal teaching centres around the study of 'cases'; in legal terms these are descriptions of previous legal decisions; by studying these, students can build up a knowledge of precedent so that they can apply the principles of a previous decision to a hypothetical decision in the class room and then to an actual legal arguments in real life when they are qualified.

The pioneers of management teaching also observed that scientists are taught laws; these laws differ from legal 'laws' since they described what will happen when certain physical conditions are fulfilled; much scientific training consists of learning to recognize situations as being example to which previously developed laws apply.

In the early years the case study method was started in a perhaps mistaken attempt to provide business students with sufficient examples of past decisions so that they would be able to recognise situations when they occurred again and apply similar solutions.

oo 00 oo

:nmb:090580

(Extracts from "A Case Writing Manual on Cooperative Management" published by the ICA-CEMAS London)

HOW TO SELECT, RECRUIT, AND RESEARCH CASE STUDY SUBJECTS

How to select Subject Organisations

Any type of Co-operative, or any other organisation such as the Government Ministry which is connected to the Co-operative, is likely to provide good material for case study.

Certain creteria should be applied before spending time on actually trying to persuade the organisation to co-operate:

1. The organisation should appear likely to be willing to co-operate since it is very easy to waste time persuading Co-operative which will not assist.

2. They should be fairly similar to those organisations in which trainees are already working.

3. The organisation should be reasonably accessible to the case writer since repeated visits may be necessary.

4. The scale of the organisation, or at least the scale of the problem, should be small enough to be properly researched and described in the time available to the case writer.

It is important that .case writer should not only look for dramatically successful or unsuccessful organisation; every organisation has successful and failure and case studies are not:

- examples of failure which are easy to criticise examples
- of success which have only to be studied and then followed by trainees.

Case studies should describe real management situations and these are present in every organisation.

When to write case studies

(a) When the opportunity arises
(b) When there is a teaching need.

These two circumstances will not necessarily occur at the same time; when they do it is obvious that a case study should be written but should case studies be written when the opportunity arises within an organisation, even if there is not an immediate teaching need?

In Co-operative Management training it is invariably true that:

1. There are not enough written case studies available
2. Case study subjects are difficult to identify and recruit

If an interesting and willing case study subject presents itself, Co-operative Management instructor is duty bound to grasp, the opportunity and write the case study even though he has no immediate use for it in his training course.

Case studies that are written in response to the need for a particular price of training material may suffer from the following deficiencies.

1. Co-operative Management is a total process and cannot be broken down into clean sub-divisions such as marketing, behavioural science or finance. One of the main virtues of case studies is that they do not suffer from this artificial academic breakdown. A case study that is written to fulfill a particular training role may artificially exclude from the description other aspects which are not directly related to the training course.

2. If the case writer is concerned with a particular training need he may himself fail to realise that a problem in his subject organisation may not really be an example of the problem in the area which is of concern to him and may have its origins in some other area. If he is writing the case study without a particular training need in mind he will more accurately describe the true situation.

3. If a case study has to be produced by a certain time and to fulfill a particular training purpose the case study may be written too quickly; because it is difficult to find a suitable subject organisation at short notice the information may be inadequate and the case study accordingly of little value.

If case studies are written whenever an interesting subject presents itself, a fund of case studies will be built up so that the need for writing cases for particular training purposes will be less.

It is of course vital that case writers share cases and that they inform their colleagues both in the same organisation and elsewhere in Co-operative teaching institutions that the case study is available.

It is often better to teach using a case study that somebody else has written; the instructor is working from the same basis of knowledge as the trainees and is not able to misuse his superior knowledge of the situation.

RECURRING CASE STUDY SUBJECTS

Once a suitable subject has been selected it is necessary to persuade the responsible official to co-operate with the case writer and to make the necessary material available.

What will he be thinking when he is approached by the case writer?

1. "These people are going to waste a lot of my time and that of my subordinate officials".

2. "These people are going to find out all the mistakes I have made and tell everyone in the world about them".

3. "These people are going to misrepresent the way in which we operate so that our members and our customers will come to believe that we are not serving their interests properly".

4. "These people are not what they seem; they may be spies of the Government or from disaffected members who are actually trying to find our confidential information for their own illegitimate purposes".

How can suspicions of this sort be allayed?

There are a number of ways in which a case writer can introduce himself and can persuade the official to co-operate; it is important to remember that this is not an ordinary 'sale'; the official must not only agree to co-operate with the case writer but he must do this in true knowledge of what is actually to be involved.

What techniques can be used in order to ensure that the Co-operative organisation is willing to provide the necessary facilities and information?

1. The case writer must approach the organisation with evidence of his bonafide association with a teaching institution: this should be done by letter or preferably by the actual presence of a senior official who is known both to the case writer and to the official whose co-operation is desired.

2. It is vital that the initial approach should be made to a senior member of the staff whose commitment to the success of the case is vital if junior members are to give their time.

3. The case writer should have available samples of case studies to show the prospective subject what is involved.

4. The case writer should invite the prospective subject to attend an actual case teaching session if possible and should ask him also to attend sessions at which his own case will be discussed if he wishes to do this.

5. The case writer should point out that the organisation will be making a valuable contribution to to improved Co-operative Management and this to the availability of trained and competent managers.

6. The case writer should point out that it is possible to disguise case studies and should show examples; he should show that if disguise is not necessary an information case study can be a valuable publicity device for the Co-operative or other organisation and enhance its reputation in the country as a whole and even internationally.

7. The case writer may appeal to the vanity of the respective subject by showing that he himself will become widely known if the case study is written about him.

8. The case writer should point out that cases are not descriptions of failure; they are merely 'slices of management experience' which are taken from the everyday experience of Co-operative Management.

HOW TO OBTAIN INFORMATION

(a) The case writer must be well briefed.

The case writer should find out in advance as much as he can about the nature of the organisation, its activities, membership, products and so on. He must not be too inquisitive but he should know everything that an informed outsider would be expected to know. This avoids waste of time and also shows the responsible official that the case writer has taken time to do some 'homework'.

(b) The case writer should be brief.

Case study subjects often fear that they will have to devote a lot of time to the case writer; case writers often find that in fact when once they start talking, officials may keep the case writer for far longer than he wishes, but it is important not to take any longer time than the subject himself wishes.

(c) The case writer should not insist on obtaining information in a particular form or in a particular way.

Information and particularly quantitative data can often be obtained in many different ways. If the responsible official is not able or willing to give a figure for annual consumption of particular item then it may be possible to find the same information by obtaining a figure for the daily amount of consumption and multiplying it by the cost per unit.

Information can often be extracted by skillful combination and manipulation for figures; case study subjects may be reluctant to give information either because they do not know or because they are unwilling.

If the case writer shows that he is able to obtain the information on his own the subject will be impressed and more willing to co-operate in future.

(d) The case writer should not stick rigidly to his plan.

A case writer may believe that one particular topic will make an interesting case study but in discussion he may find one or several other cases in quite different areas; he should be willing to follow these up in addition to or instead of his original intention. It is important to let the subject talk and to allow him to lead the writer towards problems and interesting situations.

(e) The case writer must be punctual.

He must turn up to meeting when he promises, he must not allow the case research to interpret the important business of his subject and he must produce drafts, outline or any other material when the case study subject asks for it.

(f) The case writer must offer to go to subordinates when appropriate.

Senior officials may have the time which is necessary and they will in any case be flattered by the suggestion that they are busy and that they have large numbers of subordinates; an offer to go to a subordinate is often an effective way of increasing the time spent with the senior official.

(g) The case study writer must be confidential.

The case writer must never divulge information to trainees, to his own superiors or anyone else without the specific permission of the case study subject. The case must not be used until it has been released, that is until the subject official has agreed that it can be used.

o0000o

/sml

HOW TO WRITE CASE STUDIES

We have seen and experienced something of what is involved in learning and teaching with case studies; the objective of the workshop is to go beyond this and actually to write case studies. How is this done? It is important to stress that case studies are, as Malcolm P. McNair of the Harvard Business School says, a "distinct literary form".

1. Case studies are not written descriptions of events in the management of co-operatives; such descriptions are valuable as examples but they are not case studies because they do not pose a problem.

Ask WM's to distinguish between case studies and stories, exercises or games

2. Case studies are not exercises which trainees have to solve like questions in an examination; again exercises are very valuable for testing knowledge of techniques but a case study should require the use of judgement as well as the correct use of a technique.

3. Case studies are not 'guessing games' or 'mystery stories'. There is no right or wrong answer to a management problem and the case study should not set out to 'trick' the trainees by making it obvious that there is one correct solution but at the same time deliberately concealing it from him.

Teaching Objectives

Before writing or using the case study it is obviously vital to decide what trainees are expected to learn as a result of analysing and discussing it.

This will have an important bearing on the way the case study is constructed, its length, the way its figures are presented, the amount of work that is demanded of trainees and the problems that are emphasised.

It is possible to use the same real management situation to illustrate and teach a number of different aspects of management; the learning objective must be clear before the case is written.

A Case Study Must be INCOMPLETE

A description of a management decision usually gives the background, tells what the manager decided to do and then shows what happened.

Refer to books, magazines, articles or other accounts of successful Co-operative Management. Show that they are not case studies in this sense.

A case study is unfinished; it should leave the trainee at the point where a decision is clearly required.

It may not be clear what is the problem, or what type of decision is required; it may even be appropriate for trainees to decide that nothing should be done; nevertheless it must be clear that the manager who is described has reached a point of decision.

Should there be questions at the end

Some case writers prefer to put questions at the end of case studies while others argue that this defeats a major purpose which is to force trainees to identify the problems.

Inexperienced trainees may need the help that is provided by questions, but it is probably better for questions to be put in a separate teachers' guide, so that the person who is going to teach with the case study can decide whether to put them to the trainees or not.

Ask WM's whether they find it easier to learn from and teach with case studies which have questions suggested at the end or not

A Case Study Must be PERSONAL

One of the objectives of the case method is to simulate the experience of managing a Co-operative organisation; the reader must therefore feel that he is actually the person whose situation and problem is described.

It is therefore vital that the case study should focus on one individual from whose point of view the situation is viewed. A case study should not be very objective in that it should present the situation as seen through the eyes of one of the participants in the situation which is described.

It is nevertheless important that the case writer should not allow his own judgements to enter into the case; peoples' characteristics should be indicated by their actions rather than stated;

e.g. "get out of here you fool" rather than "he tended to be bad tempered with his associates".

It must be clear what parts of the case study are the opinions of the principal actor in a situation and what parts are the objective statements of the case writer; as much as possible of the material should be given through the thoughts, actions and words of the actors in the situation rather than the bare statements of alleged fact.

A Case Study Must be DRAMATIC

The trainee must feel that he is actually experiencing the situation that is described rather than reading a description of it; this effect can often be achieved by 'setting the scene' at the very beginning in a dramatic way.

Refer to examples of case studies already in WM's possession for dramatic and undramatic beginnings. Ask WM's how the writer dealt with the problem of time sequence if he started the case with a 'here and now' dramatic statement. Ask WM's to suggest ways of making the opening sentence more dramatic in cases where it is not.

Compare these two ways of starting a case study:

a) 'The Jemb Co-operative Society was started in 1955 with thirty eight members'
or

b) 'Ali suspected that the future and possibly the survival of the Jemb Co-operative Society depended on his decision'

Clearly the second statement is more dramatic and involves the reader from the very beginning; after the scene has been set in this way it is then possible to 'flash back' with the historical background to the situation which is the subject of the case study.

A case study can be made more real and dramatic by including actual documents or representation of them if disguise is necessary.

For example:

a) 'The letter from the Adhoc sub committee had bad news for Ali; the sub committee had written that at least half the members of the Society proposed to resign unless something was done about the recording of receipts'.
or

b) 'Ali opened the letter from the Adhoc sub committee and read it':

Thursday, June 1st.

Dear Sir,

We, the undersigned members of the Jemb Co-operative Society Adhoc sub committee, must inform you that unless the system of recording the receipts is improved within the next week, at least half the members of the Society, including the undersigned, will be compelled to resign their membership.

Yours faithfully,

What problems are likely to prevent the case writer from obtaining actual documents? How can these be overcome particularly if the case is being disguise?

Obviously the second method is more dramatic. It is perfectly reasonable to <u>invent</u> documents, telephone conversations or dialogues if these will add to the drama of the situation without distorting facts; this is particularly useful when a case study has to be disguised, since it is clear that the case writer would actually have been unable to record conversations of this sort.

While it is reasonable to invent supporting documents, conversations and so on, it is important that the case writer should <u>not</u> try to distort reality by overdramatising it.

Ask WM's what might be the effect of an over-simplified or over-dramatized version of the facts.

Cases must be genuine if they are to be effective; some writers prepare successful 'armchair cases', but this is only possible when the case writer has extensive management experience so that the imaginary cases are in fact based on reality and do not over-simplify the facts.

A Case Study Must Have Enough INFORMATION

The reader must be provided with all the information which:

a) is necessary for an understanding and analysis of the situation

b) would have been available to the person from whose point of view the case study is written

Ask WM's for example which might be included by the case writer but which would not actually have been available to the person described. (Information which only became available at a date later than that described.)

Obviously information which would not have been available should not be provided; often trainees can learn a great deal about the necessity for obtaining information by research from a case study which describes a situation where a manager was trying to make a decision without having enough information.

It is more likely however that the case writer will omit facts and background information simply because he is familiar with them and he forgets that the trainee has no background knowledge of the situation.

Give examples of information which may easily be omitted such as technical data, the size and date of foundation of a Co-operative or the volume of produce processed.

It is often difficult to give sufficient information and to retain the personal and dramatic flavour which is essential to a good case study. It may be useful to put background data into a note or exhibit at the end of a case study but as much as possible of the background material should be skillfully interwoven into the case study without destroying its dramatic quality.

Refer to examples in case studies in the possession of the WM's where background information has been included in the narrative without destroying its dramatic quality.

Case writers must remember that:

a) some trainees may not be fully familiar with Co-operative systems, regulations and methods of management

b) trainees may not be familiar with particular types of crops, processes and other functions which an individual Co-operative carries out

c) Co-operative management case studies will,it is hoped, be used internationally; case writers should make some attempt to give background information on the environment in which the situation described is taking place so that trainees from other dissimilar countries can still understand the situation.

Background material on particular crops, processes or national environments, and legal regulations may well be put in a separate note at the end of the case.

Show WM's examples of notes of this sort if they are available.

A Case Study Must Have a Clear TIME SEQUENCE

The reader must appreciate at once the point of time which the situation has reached.

The sequence of events leading up to this point of time must also clearly be indicated since people in the situation are obviously aware of the order in which events took place.

Refer to the clarity or otherwise of the timing of cases which have already been discussed.

It may be difficult to combine a clear sequence of events with a dramatic presentation but this is one of the tasks of a successful case writer.

A Case Study Should be as BRIEF AS POSSIBLE

Many case studies from the Harvard Business School which as we have seen originated the case method, run to 40 or 50 pages.

It may be sometimes justifiable for a case study to be this long, if it can be studied over a fairly long period and if trainees require practice in sorting out data from large amounts of material and analysing highly complex situations.

Ask WM's whether they are familiar with this type of case study; would they be suitable for the types of training which they have to undertake?

It may be more difficult but it is far more valuable for teaching purposes if a case study can be kept to 5 or less pages.

Co-operative managers who have come for a short course will probably not be used to extensive reading and will be unable to absorb large quantities of material in a short time.

It may be possible to make a case study shorter by summarising the quantitative data in tabular form; this is obviously useful but if one of the teaching objectives is to enable trainees to select and organise data this task should not be done for them.

CONCLUSION

Since a case study is an artistic creation it is not possible to state exactly how one should be written.

If the reader feels that he is a part of the situation and that he has all the information that would have been available to the person whose part he feels that he is playing, then the case study is probably a good one.

Day 4 - Session 3

PERSUADING FARMERS TO CHANGE

Session Objective: To enable WM's to appreciate the reasons for small holders' resistance to change and to devise appropriate strategies to persuade them to adopt innovations.

Approximate Time: 2-3 hours

Materials: Case Studies 'Eslami's Coffee Farm' and 'Tomaso and the new Pyrethrum Growers' Society'.

Note to Workshop Leader

These two cases studies are typical examples of useful learning material that can quite easily be produced as a result of brief conversations with farmers who are often very willing to talk to sympathetic outsiders.

These cases should be replaced where possible by others which are more locally relevant and they should be used as examples to WM's of the useful material that can be produced with little difficulty.

These two case studies were actually first written by students who had only recently graduated from High Schools in rural areas of Africa. If time allows both case studies should be taught and discussed, each by a different WM.

Discussion may focus on the following points:

1. Why are the farmers actually reluctant to change? Are the real reasons different from those they give?

2. Are the farmers right to resist change in view of the precarious nature of their livelihood?

3. How can extension staff or Co-operative management devise effective ways of persuading farmers to change without using any element of compulsion?

4. What are the effects of compulsion and what implications have they for the genuine growth of the grass roots Co-operative movement in rural areas?

Discussion on the value of these case studies as learning material may focus on the following questions:

1. Is there a need for more information?

2. Are the case studies sufficiently dramatic and is the personality sufficiently well identified?

3. Is there a need for further technical information about the way in which Pyrethrum and Coffee should be cultivated?

4. How can pictures, tapes or other audio-visual enhancements be used to make case studies of this sort more realistic?

EDITING AND REVIEW

By this stage every Workshop Member (WM) should have written a first draft of a case study and should have had the opportunity of teaching it to the remainder of the group.

The major objective of teaching the case study was to identify the gaps, errors and other aspects of the case study which needed improvement. Even the most experienced case writers ensure that they 'test' every case study they write before it is widely distributed.

A number of improvements will almost certainly be found to be necessary in nearly all the case studies.

1. Important facts may have been omitted either because their writer was so familiar with the situation that he assumed that his readers would be similarly familiar, because of readers' ignorance of technical aspects or because the writer merely forget to include them.

2. It may have been difficult for the readers to identify with a particular individual; unless this identification is possible the case study does not have the feel of a real manager's situation.

3. It may have been clear exactly which events took place in what order. It is often more dramatic and interesting to use 'flashbacks' but it is vital to ensure that the reader clearly understands what has happened when.

4. The case writer may have concluded as a result of the test that certain technical points should be explained either in the text or if necessary in a brief note supplied with the case study. Here again close personal familiarity with a particular crop, process or organisation may load to the case writer's failure to appreciate that his readers will not always have this knowledge.

5. Simple mathematical errors will almost certainly have been made; these may result from errors of the case writers or may result from inaccurate information having been supplied by the subjects. Whatever the cause they must be corrected before the case studies are passed for publication.

6. A number of the case study subjects may have agreed that the first drafts of their case studies could be discussed in the workshop without disguise; it may be necessary that they should be disguised before publication.

7. Some case studies may have been found to be too long; WM's are likely to be able to read more quickly and to analyse and draw conclusions more easily than other trainees. Case studies must be short enough to fit into limitations of normal Co-operative trainees; background and education and to fit into the brief time that is often available for training. It may be more difficult to shorten a case study than to lengthen it but if necessary it must be done.

Editing Case Studies

It may be more difficult and time-consuming to edit and improve the case studies than it was to write them in the first place; it is almost certain not to be so interesting.

Nevertheless a major objective of the workshop was to produce training material which is suitable for publication and this cannot be done unless the case studies are suitably edited.

WM's should not underestimate to the time taken for improving their cases, particularly as when they return to work they will find a large number of tasks which they have to undertake and there will be a danger that they will forget about their case studies in their return to day to day routine.

Each WM should assess the time necessary to edit his case study and should commit himself to completing the task and forwarding a copy of the revised case study to the I.C.A.

o000o

/sml

(Extracts from "A Case Writing Manual", on Cooperative Management, published by the ICA-CEMAS, London).

THE PRESENTATION, DISGUISE AND RELEASE OF CASE STUDIES

The Micro-Case sessions have provided some practice in the actual writing of case studies; Workshop Member's (WM's) will now have to write full length case studies based on the data they have already collected.

The micro-cases were primarily exercises in digesting data and developing an appropriate style; it is now important to ensure that case studies are:

1. Laid out and presentd in the best possible way.
2. If necessary disguised so that trainees will not be able to identify the organisation involved.
3. Released by the subject organisation for use as training material.

Presentation and Layout

Case studies are often designed to provide practice in the selection and uncovering of relevant data; a case writer must not confuse the objective of providing such an exercise with the need for clarity.

Trainees are likely to have very little time in which to read and analyse case studies and it is important that the information be presented to them as clearly as possible given the training objectives.

The case writer must always remember that he has had close and continuous contact with the organisation involved; trainees must be able from the written case study alone to put themselves in a position of familiarity with the situation.

There are several choices to be made in the presentation and layout of a case study:

1. Should quantitative data be put in an exhibit at the end of the narrative or given in the narrative where it is required?

Advantages of using exhibits:

(a) the dramatic sequence is not broken by non-narrative material
(b) it may be easier to present data in the form of an exhibit than to include it in the narrative
(c) trainees can appreciate the general situation without interrupting their reading for study of quantitative data.

Advantages of putting the data at the point where it is referred to in the narrative:

(a) the trainees are not tempted to omit study of the data because it appears to be in an appendix and therefore perhaps less important
(b) it is convenient to read without having to turn over a number of pages and find the relevant exhibit
(c) it occurs in the place it refers to so that the sequence is not broken by having to turn to another page.

The best rule to follow is probably to include in the text figures which the person involved in the case study identifies or makes use of in the course of the narrative, and to put in exhibits and data which the person in the case study is already assumed to know as part of his background.

2. Should information be concealed by being intermingle with the narrative or should it be clearly laid out in a form which is immediately comprehensible?

This depends on the objective of the case study; if the trainees are to be practised in identifying and putting together data, it should not be artificially concealed but should be brought in at convenient points in the narrative; if trainees are intended to analyse the data which is already available then it should be presented as clearly as possible.

3. Should irrelevant date be included?

This depends again on the training objective; if time allows it may be useful to give trainees practice in selecting data since this is an important management task; the training objective may however not include this and if so irrelevant data should not be included.

Enhancements

Even device should be used to make the case study as real as possible:

1. Real letters, statements of accounts, reports, memos and other documents should be included whenever possible and these may of course be disguised if the whole case study has to be disguised.

2. The case writer is free to make dialogue or thoughts of individuals in the situation if these add to the drama and reality.

3. Photographs, drawings, sketches and any other visual enhancements should be included if they are available.

4. It may be possible to use tape recordings if they can be produced economically and can be reproduced in the place where the case study is to be used.

5. It may even be possible to use real objects such as small products, packages, reprints of advertisements and other similar articles.

The case writer however remember that the case study is designed not only for his own use but for wide-spread reproduction and use elsewhere.

The constraints of costs, quality of reproduction and physical handling may mean that he is restricted to the written word; if this is so the case writer must try all the more to convey the drama of the situation through good writing.

It may be possible to include transcripts of conversations which can be taped by teachers elsewhere if tape cassettes cannot be made available.

<u>Accuracy</u>

It is vital that all data and in particular figures should be correct and that the case should be carefully proof-read before distribution.

One wrong figure or misplacing of a decimal point can totally destroy the learning objective of a case study.

<u>Disguise</u>

If possible, a case study should not be disguised since the reality of the situation will be enhanced if it describes a real organisation.

Subject organisations may be persuaded to allow case studies to be undisguised by appealing to their pride, their wish to publicise their contribution to Co-operative Management education and their personal self-esteem.

If a case study must be disguised there are a number of variables which can be changed in order to conceal the true situation:

Name: The name of the Co-operative may be changed and the names of the individuals together with their sex, age etc., can be changed. Names can also be changed to suggest different races or tribes.

Place: The region, district village or even the country can be changed. Another real place may be used or a fictitious name such as 'Ruralia' can be used. The place can also be further concealed by changing details such as population, history and so on.

Time: The year and the time of the year can be changed or the data need not be given at all.

<u>Product and Process:</u> Depending on the nature of the situation the product may be changed; tea can be changed to coffee, rice to maize, cotton to sugar without any basic alteration, providing the technical processes or details are not fundamental to the case study.

If the Co-operative runs a processing operation it may be used or a fictitious name such as 'Ruralia' can be used. The place can also be further concealed by changing details such as population, history and so on.

Time: The year and the time of the year can be changed or the data need not be given at all.

<u>Product and Process:</u>

Depending on the nature of the situation the product may be changed; tea can be changed to coffee, rice to maize, cotton to sugar without any basic alteration, providing the technical processes or details are not fundamental to the case study.

If the Co-operative runs a processing operation it may be possible to move the process further forwards or backwards in the total system without altering the basic issues involved.

Generally speaking, changes in product and process are to be avoided if possible since they do tend totally to change the 'flavour' of the case study.

Figures: It is usually possible to multiply or divide all the figures by a standard factor so that the relationships are preserved but the actual figures are changed. Currencies and units of measurement may also be changed to increase the disguise. It is probably better to avoid round numbers. If all the figures are multiplied by two or five for instance, the order of magnitude will be wrong and the disguise can easily be broken. Use 1.2 or 0.8 rather than x 2 or x 4.

Other changes: In general any other basic information may be changed or introduced in order to complete the disguise. Job titles methods of presentation of accounts, and another aspects which are not vital to the case study may be changed so long as they do not alter the basic problems which are the subject of the case study.

It is usually not necessary to change all these variables; the degree of disguise required would depend on the size of the Co-operative organisation and the number of similar organisations operating in the same country.

Trainees usually do not have the time or the inclination to try to find out which is the real Co-operative which is subject of the case study, and disguise is mainly necessary in order to persuade the subject Co-operative to permit the case study to be used rather than actually to prevent trainees from finding out its identity.

Release

The Co-operative which is the subject of the case study agreed to allow a case writer to write about it. The Co-operative must obviously be given the opportunity to release the final case study.

Depending on the relationship between the Co-operative and the case writer and his Institution, release may be obtained in a number of different ways:

(a) verbal agreement may be sufficient after the subject has had the opportunity to read the final case study.
(b) the subject may be asked to initial the final version along with a statement such as 'agreed and passed for release'
(c) the subject may be asked to sign a semi-formal document prepared in advance signifying that he has no objection to the material being reproduced and used for training purposes.

Subjects will be far more likely to be willing to release case studies if they themselves have been involved in the preparation of the case study.

If the writer obtains some basic information and then goes away and is not seen again until he comes again with a final version for release, it is likely that there will be difficulties.

If the subject organisation and its staff have been involved throughout the writing process they will feel that the case study is their own and will not want to stand in the way of its use.

oo 00 oo

:nmb:090580

(Extracts from "A Case Writing Manual on Cooperative Management Published by the ICA-CEMAS, London)

HOW TO TEACH WITH CASE STUDIES

Trainees must individually analyse a case study before it is discussed in class; what is involved in this preparation?

1. Trainees must master the facts of the case study by careful reading and re-reading, and must determine the objectives of the organisation which is described. It is important that each trainees should have an individual copy of the case study so that he can mark important passages and treat the copy as his own.

The problem must be identified; we have seen that one of the most valuable advantages of case studies is that they force trainees to identify problems before the solutions; what at first sight appears to be a shortage of finance may be a poor control system; what at first sight appears to be a problem of how to dismiss a dishonest employee may in fact arise from poor selection and training procedures.

3. The various questions and sub-questions which have to be answered must be carefully identified.

4. All the possible courses of action, however absorb they may seem, must be identified and written down. These may range from liquidating the complete organisation to making no change whatsoever.

5. The likely effects of each alternative course of action must be quantified and qualitative aspects of the decision must be identified and ascribed to each possible course of action. Trainees should learn how to narrow down the area where judgement is required by quantifying every possible aspect and thus leaving only the genuinely qualitative factors which are subject to judgement alone.

6. The preferred course of action must be selected as a result of the previous analysis.

7. The results of this preferred course of action must be checked in as many ways as possible in order to be sure that it is the best course of action.

8. The analysis and recommendation must be prepared for presentation and 'selling' to the group.

We have seen that trainees may also be asked to prepare for plenary discussion of the case study in smaller groups; these groups may be asked to prepare a group or syndicate solution or they may merely be used for each trainee to test his own ideas against the comments and insights of his colleagues.

Instructor Preparation

Some instructors may believe that because they do less talking in a case study session than in a lecture, less preparation is required, nothing could be further from the truth.

The instructor must carry out the same analysis as the trainees but with the following major additions:

1. The instructor must try to look at the case study from the point of view of the whole group of trainees and in as many different ways as they are likely to do so.

2. The instructor must try to identify and follow through every possible avenue of analysis which the trainees are likely to have identified. Even if the instructor believes them to be incorrect it is vital that he should know where each direction of analysis is likely to lead.

3. The instructor should attempt to marshall every possible argument in favour of every possible solution; it may be better if he himself does not select a particular solution so that he has an open mind when teaching the class.

The Conduct of the Group Discussion

1. In a normal lecture the teacher may expect to be speaking between 75% and 85% of the time in a case study he should try to avoid occupying more than 25% of the total time.

2. An instructor who is inexperienced in the case method of teaching may believe that the fact that he will have to speak less means that less work is involved; in fact the task of supervising, moderating and guiding the discussion is a far more challenging one and requires more alert attention than the one-way delivery of a lecture.

3. The instructor must be prepared to admit that he has not identified certain courses of action or possible solutions if trainees suggest them and they are reasonable an inexperienced or insecure instructor may find this very difficult.

4. The instructor must not act as the master with the source of all knowledge; if a particular point of view is put by a trainee which appears to be incorrect, the instructor should try to elicite a correction from another trainees rather than give it himself.

5. Instructors should carefully avoid rediculing an apparently incorrect suggestion since trainees must be encouraged to put forward as many opinions as possible.

6. The instructor should try to draw out the less forthcoming trainees since they are unlikely to gain as much from a case session if they do not contribute and participate.

7. The instructor should be prepared to act as secretary by summarising trainees' contribution on the board; he should whenever possible use trainees' own words and phrases as this will bolster their confidence.

8. Instructors should not allow trainees to make all their suggestions and then ridicule them by presenting their own 'correct' solutions; if the instructor strongly believes that one solution is correct he should guide the trainees so they themselves feel responsible for having reached the right solution and they are more or less unaware of the instructor's guidance.

9. If the instructor, because he wrote the case or has other background knowledge, knows more about the situation than is given in the case study, he must resist the temptation to strengthen his own position by hitherto unknown information. If the necessary information is not in the case study, it is a bad case study.

10. Generally the instructor should be a tactful, subtle and unobtrusive guide rather than a dominant leader of the discussion. He should advance and encourage a discussion rather than inhibit it by displaying his superior knowledge. An effective case study is a joint exercise in shared learning from which a sensitive instructor can gain as much as the trainees.

11. At the conclusion of the case study discussion the instructor should summarise what has been said and if a general consensus has been reached he should summarise this and draw whatever general conclusions may be possible showing their general applications to a wider range of management problems. There is however no reason why a concensus should be reached and intelligent disagreement should be possible on all genuine management decisions.

How to Encourage Discussion

Trainees who are not familiar with the case method of teaching may be reluctant to start discussion; it may also inhibit useful discussion if trainees are invited to suggest recommendations at the very beginning since it is difficult to go back from these to identifying the problem.

It may therefore be useful to use a question such as the following in order to start discussion if the group is reluctant:

1. "What is going on this situation?"
2. "Is there really a problem at all?"
3. "What precisely is the problem?"
4. "What has caused the problem?"
5. "Are we looking at the real causes of the problem or merely at symptoms of the problem?"
6. "What are the main issues involved?"
7. "Why are these main issues important?"
8. "What are the objectives of the individual to whom the problem 'belongs'?"
9. "Are the objectives of the individual the same as those of the organisation?"
10. "What should the individual do now?"
11. "What possible courses of action are available to the individual?"
12. "Is each of the alternatives that have been identified realistic in the circumstances that are actually described?"
13. "What are the quantitative effects of each alternative likely to be?"
14. "What aqualitative aspects must be considered in addition to the figures?"
15. "What criteria should we use for selecting a particular alternative?"
16. "Is this alternative really praticable in the situation described?"

The rewards of Case Study Teaching

Instructors who are used to lecturing may find it uncomfortable to give up the security of the one-way method of communication and to expose themselves to the comments and insight of all the trainees; this may be particularly difficult when the trainees in fact have more management experience than the instructor, but in such a situation it is vital that their experience should be drawn upon by some such technique as the case study method.

Instructors who have used the same case study twenty or thirty times have remarked that they still do not know what the outcome will be of a given session with that case study and that no two sessions have ever been the same; this experience reflects the value of the case study method since it accurately simulates the everchanging dynamic aspects of management decision making.

o000o

/sml

GOOD WRITING

How to Identify Good Writing

In your career as a manager, you will be responsible for a great deal of important writing --letters, reports, proposals, prospectuses, and much more. Some of this writing you will do yourself. Some will be done by your subordinates. In such cases, it will be up to you, the manager, to approve and release what they have written. Before you can intelligently do so, you will have to determine that each document meets accepted criteria for content and communication.

To evaluate content, you apply objective standards of accuracy and completeness and relevance to the reader's needs. The more you know about the subject matter, the easier the evaluation.

To evaluate the writer's success in communicating presents different problems, and your judgment will always have a large component of subjectivity. Nonetheless, certain objective elements distinguish good writing from bad.

The Elements of Good Writing

The purpose of writing is to inform. Good writing informs easily and without ambiguity. Writing that fails this test is poor writing. So the best way to evaluate a piece of writing is to read it, then ask yourself if you have understood it. Did you understand easily or did you have to re-read and perhaps make some guesses? Are you sure of the writer's meaning? Or are there ambiguities? (In a lengthy piece of writing, ask your critical questions for each major section or chapter.)

If the answers to your test questions are mostly affirmative, the writing has communicated effectively. You may have found lapses in grammar or spelling or punctuation; however, these niceties, of themselves, rarely make the difference between good writing and poor writing.

If the answers to your test questions are largely negative, you will want to identify the sources of the trouble. The most likely sources are word choice and the construction of sentences and paragraphs.

This note was written by John B. Bennett, Lecturer, for the use of students at the Harvard Business School.

The basic building blocks of communication are words. You expect a writer to use the exact word and to refrain from using two words (or more) where one is enough. The average length of the words is also important, because an idea expressed in short words can be grasped more easily and more quickly than the same idea expressed in long words.

Words are formed into sentences. At the least, a sentence includes a subject and a predicate:

Subject Predicate

High leverage attracts the shrewed investor.

Subject or predicate or both may have one or more modifiers; the predicate may have an object. In some instances, the subject may be implied, as in the one-word sentence "Stop!"

No matter how it varies, the subject-predicate structure is the basic format of a sentence, and you should be able to identify subject and predicate in every sentence. As with words, the length of a sentence is important: Short sentences are easier to understand then long sentences.

Sentences are combined into paragraphs. Like sentences, their proper construction depends on the ideas they are intended to express. A well planned paragraph contains a topic sentence (often the first) which states the theme of the paragraph. The remainder of the paragraph develops that theme:

> High leverage attracts the shrewed investor. (A stock has high leverage if the company that issued it has a large proportion of bonds and preferred stock outstanding in relation to the amount of common stock). A smile example will explain the attraction. Let us take a company with $10 million of 4% bonds outstanding. Suppose the company earns $440,000 before interest has been paid on the bonds. That leaves $40,000 for common-stock dividends after $400,000 bond interest has been paid. Here a rise of only 10% in earnings (to $484,000) will leave $84,000 for common-stock dividends, or an increase of more 100%. If there is only a small issue of common stock, the increase per share is very attractive.

In a well written report, you can identify the topic sentence in each paragraph. If you write them down in sequence, the topic sentences should form a rough but accurate summary of the report (and each of its subdivision). Redundancies, irrelevancies, and gaps in the coverage show up quickly in this test.

Paragraph length is not as important for easy understanding as word and sentence length. However, a large number of one-sentence paragraphs or of one-page paragraphs is a symptom of poor writing. The one-sentence paragraph suggests that the writer has stated a topic, then failed to develop it; or he may have illogically put the development in a separate paragraph. The one-page paragraph suggests that several topics may have been indiscriminately lumped together instead of being stated and developed independently.

Aids for the Reader

No writer needs to write for his own sake. He already knows what he wants to say (although some case in writing it down may clarify his thinking). So the thoughtful writer's concern is for his reader, and his objective is a message that is easily and accurately understood. Proper choice of words, simple sentences, and well built paragraphs are basic requirements. But the writer can do more for his readers.

A carefully worded title is of immediate value to the reader as a generalized abstract of the contents. In a report of any length, section headings reveal the structure of the report and help the reader to follow its development. Headings should carry a message about the content rather than the process of the report. "Introduction", "Analysis", and Conclusion", for example, are not particularly informative; by contrast, the headings in for example, are not particularly informative; by contrast the headings in this note give you some idea of what the note is about and how it is organized. There are no conventions about the frequency of headings, but certainly there should not be a heading for each paragraph. At a minimum, each major section of a report should be identified by a heading.

In a different category than headings are visual aids such as graphs, charts, tabular material, and other non-verbal means of communication. Any of these may powerfully supplement or replace the written word, and the writer should select the combination that will best reach his prospective readers.

Evaluator's Checklist

As a guide for evaluating a given piece of writing, these concerns for word choice, sentence and paragraph structure, overall organization, and reader aids can be reduced to a set of questions:

1. What is the subject of the report? How do you know?
2. How is the subject organized? How do you know?
3. Do the topic sentences form a complete and informative summary?
4. Is average word length short?

5. Is average sentence length short?
6. Are headings used? Are they informative?
7. Are visual aids used effectively and where they should be used?

There are of course other factors that distinguish good writing from bad. However, your evaluation will be consistent and dependable if you rely on those I have discussed. They are the most important. Writing that handles them well is good writing.

How to Write Good Writing

Part I of this note identified qualities that have a high correlation with good writing. As a writer, you must make sure that these qualities -- as a minimum -- are present in your own writing. If they are present, it is because you have been continuously aware of your intended readers, who they are and what they need. You must begin to think of your readers early, when you are first preparing to write. You must continue to think of them while you are writing a draft (at least one) and as you are revising the draft. A few simple guidelines will help you to carry out these three separate phases of the process of writing.

Preparing to Write

Before you start to write, you must know precisely what you expect your communication to accomplish.

1. Decide whom you are going to write for. Thus you will be able to direct your writing to the specific needs of specific readers.
2. Decide why you are going to write so that you can take the proper approach. Your purpose will be one or more of these -- to inform, to persuade, or to give orders.
3. Decide how you are going to write. The best way of deciding is with a carefully organised outline to guide you as you write.
4. Review your outline to evaluate how accurately it reflects your intentions.

Writing a Draft

The purpose of the draft is to give you something to revise.

1. Start to write without hesitation. The first few sentences won't satisfy you; improve them when you revise.
2. Write fast. Your objective is to get your ideas on paper in the least possible time.

Don't stop to check spelling or grammar or punctuation or even your facts; verify them when you revise. Don't stop to improve individual sentences or paragraphs; change them when you revise.

3. Finish as much of the writing as you can at one time or in the fewest possible number of writing sessions. No matter how fast you write, you can't always finish your draft in a single session.
4. Use suitable aids for your readers

Choose the best means of communication. Words may be supplemented or replaced by tables, charts, graphs, drawings, and photos. (It's possible to develop your visual aids before you write or after. Experiment to find out which sequence suits you best)

Take care in composing a title and section headings that accurately show content and its organization.

Revising the Draft

Allow some time to elapse between writing and revising. Then review what you have written.

1. Check the organization. Is it logical and clear? Does it suit your readers' needs and present your message efficiently and effectively?
2. Check the contents. Is your presentation accurate and complete? Will it achieve your propose?
3. Check the style. Is it simple and natural? Have you used short words and short sentences?
4. Check the details. Are grammar spelling, and punctuation conventional and internally consistent?
5. Check the format. Is your message presented in a form that will be easy for your readers to understand?

And Finally

"Anything that can be misunderstood will be misunderstood." Do your best to ensure that what you write cannot be misunderstood. Equally important, try to ensure that your readers will understand quickly and easily.

Looks for Good Writing

Even the best writers (and their supervisors) occassionally have questions about writing. A very small collection of books will provide the answers for most questions of this sort. These are the books I recommend:

<u>English Essentials</u>, Herbert B. Nelson; Littlefied, Adams and Co., Totowa, N. J., 1958 -- systematic, easy to follow review of the essentials of grammar (with self-scoring exercises).

<u>The Golden Book of Writing</u>, David Lambuth and others; Viking Press, New York, 1964 -- brief, practical suggestions on writing.

The Perrin-Smith Handbook of Current English (2nd ed.), Porter G. Perrin and George H. Smith; Bantam Books, New York, 1962 - an exhaustive text designed to help students increase their skill in writing to meet the expectations of educated readers.

Webster's Seventh New Collegiate Dictionary; G. & C Merriam Co., Springfield, Mass., 1963.

####

fts/10/7/80

MICRO CASE 1

TRANSCRIPT OF A CONVERSATION BETWEEN A CO-OPERATIVE COLLEGE LECTURER AND THE MANAGER OF A PRIMARY CO-OPERATIVE SOCIETY

Lecturer : "It's good of you to find the time to see me; how are things going with your Society at the moment?"

Manager : "On paper everything looks good. We have repaid our loan, the members are generally loyal to the Society and our Committee takes an active interest in what is going on. In fact, maybe they are too interested ...."

Lecturer : "What do you mean? I have never heard a manager complain about a Committee which is too active; usually they are worried because members don't turn up for meetings."

Manager : "I know, I used to have that problem too, but now our Committee is seriously divided on one income, so much so that I sometimes wonder whether the Society will survive."

Lecturer : "Dear me, that sounds serious. What is the point at issue?"

Manager : "Well, as you know, this Society was set up to process and market rice; we have done a pretty good job with that, but the whole Society, and the Committee, are divided about where we should go next."

Lecturer : "Isn't it just a matter of deciding what the members need, and making sure that any new project will pay for itself?"

Manager : "I'm afraid not. You see, some of our members keep cattle as well as grow rice; as you know, farmers around here have to spray their cattle at least once a week to keep them free from tick fever."

Lecturer : "I know, but what's that got to do with a Rice Co-operative?"

Manager : "That's exactly what most of the members say. But at the last annual meeting in November last year, someone suggested that we should build a cattle dip. It is far quicker, easier and more reliable to dip cows than to spray them, but no farmer on his own could possibly afford to build a dip."

Lecturer : "Was the idea well supported?"

Manager : "About one hundred members came to the meeting out of a total membership of five hundred. This is a bad attendance actually. Some twenty of them supported the suggestion."

Lecturer: "Wasn't that the end of it then?"

Manager : "No, we finally agreed at the meeting that I should look at the possibility and report back to the Committee. I made some enquiries and found out as much as I could."

Lecturer: "How did it look on paper?"

Manager : "Well it all depends on how you look at it. The dip would cost $1,500 including the land, and the National Co-operative Bank told me that they would be happy to lend us the money to be repaid over five years at $350 a year including interest."

Lecturer: "That sounds like a lot of money."

Manager : "Yes, and that's not all. I made some enquiries from Societies who have dips around here. You need someone to operate the thing and to control and record it use. That would cost about $15 a month."

Lecturer: "Don't you need a lot of chemicals and so on?"

Manager : "Yes indeed, we should have to spend about $300 a year on chemicals to be sure that the cattle were properly protected."

Lecturer: "Have you given this information to the Committee?"

Manager : "Oh yes, we had a meeting in January."

Lecturer: "I suppose they threw out the idea; it sounds very expensive."

Manager : "No; we have nine Committee members; seven were against the dip but two were in favour of it. No decision was taken."

Lecturer: "How could that be, don't the figures speak for themselves?"

Manager : "Yes, it would cost a lot, but they argue that it would earn a lot too. You see, the normal charge is 2½ ¢ a cow for each dip; about one hundred members, who own around one thousand cattle between them, said they would dip their cattle every week for that price if the dip was built."

Lecturer: "Could the dip handle that many?"

Manager : "Oh yes, in fact it could handle up to two hundred and fifty cattle each day and quite a few other members told me that they might use the dip once they had seen that it worked with other peoples' cattle."

Lecturer: "Surely all you had to do was to work out the figures and see whether or not the dip would pay for itself?"

Manager : "No, it wasn't that simple, the Committee more or less ignored all these figures."

Lecturer: "What did they argue about then?"

Manager : "Well, the majority said that the two supporters of the dip were only in favour of it because they happen to live near the place where it would be built. Our Society covers a wide area and only a hundred or so so members could possibly use the cattle dip each week; the rest live too far away as do the seven Committee members who are against the idea."

Lecturer: "How was it resolved?"

Manager : "They asked me to make a firm proposal at the next Committee meeting next week, but I don't know what to do. The two supporters of the dip have told me that several members have said that they will withdraw from the Society altogether and start their own group with rice processing and a cattle dip, unless they build one. This would destroy the Society completely if they carried out their threat."

Lecturer: "Why not propose that you build a dip then?"

Manager : "The other seven members are determined to veto it, they say that we should only provide services which benefit all the members. What am I to do"?

________ oOo ________

CATTLE DIP

By: Amado B. Torralba

Characters in this dialogue are:

Tony Samonte, a good friend of the Manager of Mabuna Marketing Cooperative and a professional cooperative consultant.
Prospero Cajulis, Manager of MMC and friend of Tony, the consultant.
Benny Grospe, a committee member and also friend of the two.

TONY : Ah, you must have Extra Sensory Power (ESP)! For here you are and yet just yesterday I was on my way to see you myself. Only I had some visitors so I put off for today my seeing you. And here you are.

PROSPE : The ESP is mutual. But I still consider myself luckier for I know it's difficult to see you, knowing how busy a person you are. At any rate I came to consult you on ...

TONY : Well, I may perhaps know what it is all about, unless it's for something else. But, is it about the "Cattle Dip?"

PROSPE : Exactly. Now it makes it easier for me to proceed.

TONY : I've learned about that idea which cropped up during the General Assembly. And I have also been informed about your deliberations in the committee.

PROSPE : And you also know that there was no definite action of the committee? That seven were against and two were in favor of it?

TONY : Sure, sure. I've been informed.

PROSPE : By whom?

TONY : Who else. Benny himself told me about it. Isn't he a member of the committee? He said so.

PROSPE : Oh, Benny. Yes, he is a member of the committee. In fact he was all out and out for the building of the cattle dip. But, tell me did he tell you about their threat?

TONY : Oh, no. He didn't mention any threat at all. What is the threat and whose threat is it, tell me.

PROSPE : That unless the cattle dip is finally constructed several members will withdraw from the society altogether and start their own group of rice processing and a cattle dip.

TONY : Why didn't you have the data about the advantage and disadvantage of the project? As a manager you must have these before the meeting.

PROSPE : Sure I had the figures and I explained them very well. I didn't undergo your tutelage in cooperative management for these last several years for nothing. Didn't Benny tell you how thorough my explantion was?

TONY : Well, well, thanks for the compliment. But Benny failed to tell me. Just how exactly did you explain?

GROSPE : The construction of the dip and the land on which it will be constructed would cost $1,500. This amount can be available as a loan from the National Cooperative Bank, repayment within a little over five years at $350 per year. Now we'll be paying someone to attend to its operation control and recording at $15 a month or a total of $180 a year. Another expense is $300 a year which will go to chemicals needed. All in all we'll be needing $830 a year.

I then pointed out that our yearly income, however, would be $1,200 or a net gain of $370. Of course I explained that this yearly income of $1,200 is arrived at by multiplying the number of cows by 2 1/2 ¢ which will be the change per cow, again multiplied by the week, etc., etc.

One more thing I emphasized is this: that after 5 years we shall have an added fixed asset, the land, aside from an income of $720 a year.

TONY : Very well done. And did you say that inspite of your explanation the seven were not convinced?

PROSPE : I'd say they were. ~~The~~ who trouble was when they said: you (referring to the two were in favor) are in favor of this dip simply because you live near the place and hence, you'll be most benefited.

TONY : Well, that indeed must have been hurting to the feeling of Benny and his companion. Now, who actually made the threat?

PROSPE : Who else but the two supporters - Benny and his companion of course!

TONY : You are indeed a good manager. You are always concerned about the welfare of the society. But .....

PROSPE : Indeed, indeed. What do you think of me? Let it go as things stand? Hey, but you said something like, "but ... mind telling me what you mean by the but?

TONY : Ah, yes, I was about to say. But do you honestly believe that the two, meaning Benny and what's the other guy? Will carry out the threat once it is definite that the cattle dip will not be pushed through? Another thing. The threat you said will involve several members withdrawing. But you are not certain who will be leading these members or are you?

PROSPE : You give me an idea! Is the threat real? Or is it just something else? If real, then what am I to do? If not real, what am I to do so it would not happen. I'm surely in a fix. What am I to do? What I am to do?

# # # #

tav/10/28/80

MICRO CASE 1:

A CATTLE DIP

by

A. M. Salcedo

A primary cooperative was set up to process and market rice, with five hundred generally loyal members who grow rice and keep cattle too. It had a committee of nine members who are very active. The society had repair their loan. Inspite of it, Fred, the manager was so worried for the society to collapse if the committee can not agree with each other for a common cause and that is nothing but for the society itself. This was so because during the last annual assembly meeting attended by some 100 members, suggestion for the society to have a cattle dip was raised and supported by some 20 members. The dip is more quicker, easier and reliable measure in preventing tick fever than spraying for cattle at least once a week.

As per agreed in that meeting, Fred made some inquiries for the possibility of having one and reported to the committee. The dip alone would cost $1,500 including the land, the National Coop. Bank will make available the financial requirement payable in five years at $350 a year plus interest, operator's wage to cost $15 a month (control & record its use), $300 worth of chemicals per year needed to properly protect the cattle. Two members of the committee favored the proposal but no decision was made on the argument that although it would be expensive, it would not earn a lot too. The dip normal charge per cow per dip is 2-1/2¢. One thousand cattle owned by a hundred members keeping cattle, is expected to dip every week for that price. The dip could handle up to two hundred and fifty cattle each day and more members would be using it once proven workable with other keeping cattle.

Still, this report of the manager was ignored by the opposing members of the committee because it would be built near to only some members including the two committee members who are in favor of it, and so only few would be benefited. The supporters of the dip informed the manager that several members are resigning to form a new rice processing and a cattle dip of their own if the society could not have one. On the other hand, the opposing member of the committee were determined to depend their side for the society to provide services that will benefit the entire membership. If you were Fred, what will you do? The manager was asked to make a firm proposal at the next meeting next week.

Micro Case I Session 14

WHAT'S IN A DIP?

By: Jack R. Batoon

Mr. Lopez is a newly hired manager of the Masagana Farmers Cooperative with a total membership of 500 rice farmers. An outbreak of a cattle disease in the area called a tick fever was brought to his attention and that 100 members of the coop with about 1,000 heads of cow are endangered with the disease. Some of the affected members suggested that a cattle dip be constructed to safeguard the health of the cattle.

Being new in his position, he convened the coop executive committee composed of nine members hoping to draw from them the support that a cattle dip could be constructed. However, he was disappointed to learn that seven members of the committee were against the construction of a dip and only two were in favor.

Mr. Lopez was not able to convince the seven committee members that the coop can construct the dip at a cost of only $1,500 to be financed by the National Cooperative Bank repayable in five years with an annual amortization of $350 per year including interest. He further estimated that the dip shall only spend $300 on chemicals yearly and a minimum cost of $15 weekly for administrative cost. These figures did not seem to impress the seven committee members and they voted down the proposal.

On the other hand, the 2 remaining members of the committee who approved of the project were convinced of Mr. Lopez' data that about 1,000 heads of cattle would be dipped every week at the rate of 250 cattle per day. A fee of 2-1/2 centavos shall be charged per cow. About 1/5 of the whole membership are potential users of the cattle dip.

After his meeting with the committee, he overheard that the two committee members voted in favor because they live near the dip site while the rest of the committee members live far and it would be inconvenient for them to use the facility.

###

/cma-10-17-80

THE DIP

By: Emmanuel T. Cuaresma

The Manager of X Marketing Cooperatives was a satisfied man in terms of the current operating situation of the coop. Equally, he was happy that loans were paid on time, members were generally loyal to the society and the committee took an active interest on what was going on.

While the operation involved processing and marketing of rice, some members had made known their desire to introduce a new service that could benefit all of them. Being producers of cattle aside from their major activity of rice farming, the members wanted to know about the possibility of constructing a "dip" to replace the tedious job of spraying the cows weekly to rid them of tick-causing fever. This process would be easier, quicker and more reliable. Since the "dip' was relatively expensive for individual farmers, someone suggested during the last annual meeting in November last year, to build a common facility for all. Of the five hundred members of the society, one hundred attended and twenty supported the idea.

And so the Manager was made responsible to look into the possibility. He made some inquiries and found out that the "dip" would cost $1,500 including the land. And that the National Cooperative Bank was willing to finance it, repayable in five years at $350 yearly amortization including interest. Further inquiries from other societies with "dip" showed that an operator at the cost of $15 a month and $300 worth of chemicals yearly were needed to operate it.

The Manager reported his findings to the committee which deliberated on the issue. Of the nine members only 2 were in favor. The two argued that the project, though expensive, will be self-paying as one hundred members with about one thousand cattle between them were willing to dip their cattle once a week at a charge of 2-1/2 cents a cow for each dip if it were built. The proposed "dip" could handle two hundred fifty cattle each day and was large enough to accommodate more.

When the Manager presented the figures to the committee, they completely ignored the fact that it could pay for itself. They argued that not all members will be benefitted by it.

No decision was made on the issue but the Manager was expected to make a firm proposal next committee meeting. Whether or not he would support the project was compounded by the threat of the two supporters from the committee and several members from the society to start their own group. This would destroy the society if it were carried out. The Manager was in a quandary as he expected the seven dissenters would veto the proposal.

How would you analyze the situation?

/cma/10/17/80

A Manager's Dilemma

By: Yolanda C. Guevarra

Mr. Antonio Exconde, Manager of Grains Marketing Society is faced with a dilemma. Next week, he will meet for the second time the Project Committee to decide on the proposal of putting up of a cattle dip for the members of the Society. This proposal was suggested by a member during the last annual meeting held in November last year and was supported by twenty of the one hundred members who constitute one-fifth of the total membership. It was agreed during this annual meeting that Mr. Exconde should look into the possibility of putting up the dip and report back to the Committee.

Still vivid in his mind were the proceedings of the first meeting he had with the Committee. He remembered the tensed atmosphere within the conference room when he presented the following information he gathered through inquiries from knowledgeable authorities including other societies that successfully built their own cattle dips:

1. The construction of the dip including the land would cost $1,500.

2. The Society could avail of a loan equal to the amount ($1,500) from Sta. Maria Cooperative Rural Bank payable in five years at $350 a year including interest.

3. A dip operator should be hired at $15 a month to operate and control the cattle dip.

4. Annually, chemicals for dipping solution amounting to $300 would be purchased to ensure proper protection of the cattle.

Expensive as the building of the cattle dip might have been, still there was no decision made as the committee members took different stands. Two out of nine members voted in favor of the proposal and expressed their desire to get on at once to build a dip. They argued that although at first it would cost a lot, it would later generate more and more income for the society since about one hundred of the members who own one thousand cattle are willing to dip their cattle every week for the price of 2½ ¢ a cow for each dip and still more members will dip their cattle once they observe that the dip works well with other people.

Taking their turn to air their views, the other seven committee members said that the two supporters as well as the other one hundred members were in favour of the project only because of the proximity of their houses to the place where the dip is to be built. Engaging in such project, they said, will not service the majority since 4/5 of the total membership live too far away including themselves.

As he thought of the problem more and more, he left the compounding effect it would have on the stand he inevitably would have to take. And as he tried to visualize in his mind his proposal he recalled also the conversations he had with some of the 9 committee members as well as with other society members. He remembered clearly the two supporters of the project saying that the project could be a good income-generating project since it could handle up to two hundred and fifty cattle each day. And he felt more sad that the two supporters said further that several members posed their threat to withdraw from the Society altogether and start their own group with rice processing and a cattle dip unless the Society build one.

And in his dismay, he uttered loudly, "What am I to do?"

# # #

/tcg/10/17/80

A CATTLE DIP

by

Felix L. Benito

Mr. Pastor Torralba, Manager of the Mawawasak Farmers Cooperative, sat perflexed at this desk as he stared at a note in front of him. The note reads:

October 8, 1980

Dear Pastor:

The members wanting for the cattle dip are dead set in withdrawing from the Society to put up their own rice processing and cattle dip, if the Society fails to build said dip. I and Philip have no alternative but to join their group. We are not threatening, but we do promise to withdraw, IF...

Fel

Fel and Philip are two members of the Board of Directors who are influential and well liked by many of the 500 farmer-members. They vigorously supported the dip issue but they were mercilessly outnumbered by the other seven opposing members of the Board at the last meeting in January, though no decision was arrived at. The Manager was then asked to make a firm proposal and report same at the next Board meeting in February.

As the Manager tried to contemplate on his next move, he could not help but review the Society's past. The Society had repaid its loan, the members are generally loyal and the Board takes an active interest in what is going on. The Society was originally set up to process and market rice and so far it has been doing good.

However, lately some 100 members with more than a thousand cattle between them are troubled to spray their cattle at least once a week to keep them free from tick fever. In the last annual meeting in November last year someone suggested that a cattle dip be constructed. It is far quicker, easier, and more reliable to dip cows than to spray them. No farmer on his own, however, could possibly afford to build a dip.

Pastor also reviewed on his inquiries and findings on the possibility of putting a dip which he was required to do by the General Assembly. His findings were:

1. The dip would cost $1,500 including the land.
2. The National Cooperative Bank is willing to grant a loan payable in five years at $350 a year including interest.

3. Someone is to operate the dip and to control and record its use with a monthly cost of $15.00.
4. Yearly cost of chemicals to be used to ensure that cattle were properly protected is $300.00
5. The dip can normally charge 2-1/2¢ per cow for each dip. (The about one hundred members who own one thousand cattle between them, said they would dip their cattle every week for that price if the dip was built.)
6. The dip can handle up to 250 cattle each day.

The manager also took note of the stand of the seven opposing Board members in the January Board meeting that in spite of the above facts and figures, they are against it because "the two supporters are only in favor because they happen to live near the place where it would be built. The Society covers a wide area and only a hundred or so members could possibly use the cattle dip each week; the rest live too far away. The cooperative should not be offering service only to a few members but to all members." The manager also knew of the fact that the said 7 opposers also live far away and are determined to veto the proposal for the cattle dip.

If you are Pastor, what will be your next move to save the Society from disintegration?

# # #

ldg/

The Case of the Controversial Dip

By: Pat R. Estacio

Mr. White looked pensive, seated on his chair, as he stared blankly at his cost data on a cattle dip which two members of his committee wanted to build for their society's members.

Actually, it was not only the financial aspects of the project that was bothering him; the impending rift between his nine committee members was giving him more headache. He knew that if a satisfactory compromise was not reached soon, the issue might blow into unreasonable proportion and might divide, if not totally wreak his society.

As he turned over his cost estimate, he mentally reviewed the past events that brought about the controversy on the proposed cattle dip. It all started in their coop's last annual meeting in November last year when a member suggested that the society build a cattle dip. The reasons advanced were very convincing - some members keep cattle as well as grow rice. Farmers have to spray their cattle at least once a week to keep them free from tick fever. If a dip would be constructed, dipping would be far quicker, easier and more reliable. He recalled that twenty of the one hundred members who came to the meeting supported the suggestion.

As agreed upon, Mr. White made inquiries, prepared his cost estimates and reported back to the Committee. That cost estimate is what he was turning back and forth, without really seeing it, and which contained the following:

Cost of construction, including land	-	$1,500
Wage of dip operator - $15/month	-	180/year
Cost of chemicals to be used for dipping solution	-	300/year

The events that followed were even more vivid in his mind. He sat up, very rigid and motionless, all tensed up just like the way he felt when the society's committee met the following January. It was as if he was reliving the experience all over again.

The discussion was heated, with fists occasionally banging the table as if to help drive home the points they were discussing:

Mr. Brown: "But so what if the dip is expensive. It would earn a lot too. At 2½ cents a cow for each dip that the members are willing to pay, and at 100 members owning one thousand cattle - and with each member intending to dip their cattle every week - can you imagine how much income that would generate?"

Mr. Smith: "Oh, but don't forget - your dip can only handle 250 cattle a day. It does not need a lot of imagination nor a good arithmetical skill to tell you that you can hardly serve the 100 members. And what will happen when the other 400 "use" the dip after they see that it works with other people's cattle?"

Mr. Raymond: "And not only that. We have 400 members who live too far away from the dip. They'll never get a chance to use that dip, and, isn't a cooperative society organized to serve the needs of all its members, and not just a few? If we build that dip then, isnt that a blatant violation of this principle?"

Mr. Spencer: (Turning to Mr. Brown) "Why don't you just admit it?" You're fighting for that project because you live near the dip site?"

Pandemonium almost broke out as everyone started to s ay something all at the same time, taking sides on the issue. Order resumed only when Mr. Monroe, the chairman, banged an ash tray on the t able.

"Gentlemen, please! let's have some order. To resolve this once and for all, let's take a vote on the matter."

As expected, Mr. Brown and Mr. Kennedy, the committee members who were residing near the proposed dip site voted for the project, while the rest of the committee, all seven of them, voted against.

Mr. White shook his head as he remembered his yesterday's conversation with the supporters of the dip. The exact words of Mr. Brown echoed in his mind.

"This is not a threat ... but several members who want to see the construction of the dip pushed through have already signified their intention to resign from the Society and start their own group with rice processing and a cattle dip if this project is shelved. Remember that .... don't say we didn't warn you ...."

Mr. White was jolted to the present when the phone rang. As he reached out for it, he still was undecided on what firm proposal to submit at the next committee meeting because as the seven dissenting members repeatedly said ... "Our coop society should only provide services which will benefit <u>all</u> the members ... not a few ... not many ... but <u>all</u>."

# # # # #

/tav/10/17/80

Micro Case I

Session 14

A CATTLE DIP ISSUE

By: LITO S. MAYUGA

Mr. John Ford, a Manager of a well-known Cooperative Society engaged in rice production as well as cattle raising was a little bit worried about their cooperative. While resting on his house terrace, his wife Cely came into the picture. She knew his husband have problems and she ought to know it for moral support. Something's bothering you, John? Cely asked, Oh! yes, John quickly replied. Our cooperative society have an issue regarding building up a cattle dip. During our last meeting, only 100 members were present out of 500 members and 20 percent of this suggested the Cattle Dip issue. I have made some inquiries about it. By the way, out of the nine (9) standing committee members, only two (2) committee members were in favor about it and seven (7) committee members were against the proposal.

In putting up a cattle dip, as John continued, it may cost us \$1,500 including the land. One bank was interested to lend them money to be repaid in five year at \$350/year including interest. In addition to this, the dip should have an operator/controller to record the member of cow dipped with a compensation of \$15 a month equivalent to \$180 a year. The full capacity that the dip could accommodate is 250 cattle per day. The normal charge of dipping is 2-1/2 ¢ per head and about one thousand cattle would be dipped every week as programmed by the one hundred members. On this regard, the supporters of the two committees in favor of constructing a dip threat the society that they will withdraw from the organization altogether and start their own group with rice processing and a cattle dip unless the society build one for them. But in contrary, the seven committee members were determined to veto it. According to them, the two supporters were only in favor since they happened to live near the location where the dip would be constructed. Moreover, the society covers a wide area and only a hundred or so members could possibly use the cattle dip every week. Lastly, they say that the society should only provide services to benefit all the members.

Then, what shall I do, Cely in order not to destroy the society completely? What shall I do?

*****

norms-102180

A Primary Cooperative Cattle Dip

By: Pastor N. Estioko, Sr.

A Primary Cooperative Society in Alaminos, Pangasinan, under the managership of Mr. Protasio Ambrosio, had a total membership of five hundred (500) strong. Mr. Protasio Ambrosio was fifty years old when he was appointed manager. He was an honest man and was backed by years of experience in the field of cooperatives.

The Primary Cooperative Society was engaged in a business set up to process and market rice. On paper everything looked good. It had repaid its loan and the members were generally loyal to the Society and the Committee took an active interest in what was going on. As a matter of fact the committee was too interested.

Last annual meeting in November last year, out of the total membership, only about one hundred members attended. In this meeting someone suggested that the Society should build a cattle dip. Unluckily and or luckily, some twanty members supported the suggestion.

However, in spite of the bigger number of members who did not support the suggestion, it was agreed that the Manager would look at the possibility and report back his findings to the committee.

The Manager, in his effort to gather inquiries about the project, the cattle dip would cost $1,500.00 including the land. To finance the dip, the National Cooperative Bank would be happy to lend the money payable in over five years at $350 a year including interest.

The Manager was also informed that someone was needed to operate the thing and to control and record its use for $15.00 a month. About $300.00 a month was also required for chemicals to be sure the cattles would be properly protected from tick fever.

The Manager reported his findings to the committee in a January meeting. Seven of the 9 committee members ruled against the dip. And no decision was taken up.

The dip would earn a lot according to figures presented. The normal charge would be 2½ ¢ a cow for each dip. Some one hundred members owned around 1,000 cattle and would dip their cattle every week for that price if the dip was built. The dip could handle up to 250 cattle each day and quite a few other members might use the dip once they saw it would work for other people's cattle.

In spite of the figures presented, majority said that the ~~two~~ who supported the suggestion were in favor because they happened to live near the dip where it would be built. The Society covered a wide area and only a few hundred members could use the dip.

Several members would withdraw from the Society altogether and would start their own group with rice processing and a cattle dip should they not build one. The 7 members who were against the suggestion were determined to veto it, for they said that they should only provide services which benefit all members.

How would have the Manager resolved the case?

# # # # #

tav/10/17/80

(Sample Case Study Based on Micro Case 1 Dialogue)

THE COOPERATIVE CATTLE DIP

The committee of the Farmers' Co-operative Society was seriously divided over whether or not to build a cattle dip. The Annual General Meeting of the Society had been held three months earlier, in November 1975. About 100 members, or one fifth of the total membership, had come to the meeting. One member had proposed that the Society should build a cattle dip, and about 20 others had supported the idea. At the monthly committee meeting in January 1976, two of the nine members of the committee argued in favour of the dip; it happened that their farms were quite close to the place where it might be built. The other seven members argued that rice processing and marketing was the most important activity of the Society. They said that any new ventures should be useful for all members, and not just for a few.

Mohamed, the manager of the Society, was very worried about this disagreement, because the committee members were getting quite angry with one another, and he was afraid that it would interfere with the smooth running of the Society. He suggested that they should look at the estimates for the dip, and try to make a decision based on the figures he had prepared.

The General Meeting in November had argeed that Mohamed should find out how much it would cost to build and operate the dip, and that he should ask members how many cows they would bring to be dipped if the dip was built. Mohamed had collected the following information:

1. The dip would cost $1500 to build, including the land where it would stand. It should last about five years before major repairs became necessary.

2. The Society could borrow $1500 from the Co-operative Bank, to be repaid over five years at $350 per year including interest.

3. The operator of the dip, who would also record the names of the members who used the dip and how many cows they dipped, would have to be paid $15 a month.

4. The chemicals and other materials necessary for good dipping would cost $300 a year.

5. The normal price for each animal dipped was 2 1/2 cents, and if the dipping was to be of any value, the cows had to be dipped every week.

6. The proposed dip could easily take 250 cows each day. About 100 members, each owning about ten cows, had told Mohamed that they would make sure that every cow was dipped once a week if the dip was built.

7. Some other members who owned cattle had told Mohamed that they would wait and see what difference the dipping made to the cows before deciding whether to use it for their own animals.

The committee members listened carefully to Mohamed's estimates but when he had finished reading them, they started arguing again about what the figures meant. The members who were against the idea said that it was surely very wrong for all the members to take the risk of borrowing $1500, and to have to repay it and pay the interest every year, when it would benefit only one member in five. The two farmers who wanted the dip argued that any venture which benefitted the Society financially was surely good for all the members, even if they did not use it.

Finally the Chairman said that they must not go on talking all day about the cattle dip. He said that they would have to delay the decision until the next meeting, in February. He asked Mohamed to try to put his figures together in such a way that the Committee could see whether or not the proposed cattle dip would really be a good venture for the Farmers' Co-operative Society.

###

/sml: 10-9-80

CONTENT AND PROCESS IN CASE METHOD TEACHING

By: Lieutenant Colonel
Charles R. Holloman

Available evidence indicates that the case method of teaching is capable of producing dramatic learning outcomes. A major problem arises, however, in that such learning cannot always be exaplained in terms of conventional learning theory. Since the case method is a group method, one explanation frequently offered is that interactive discussion and decision making are causal factors in enhancing learning. The basic assumption in this paper is that the case method may well be both an advantage and a source of difficulty for students and instructor alike.

The problem-solving processes used in the discussion of cases by student groups are often viewed only from a rational-logical approach. This viewpoint does not come to terms with the important aspect of inter-personal relations among students and between them and the instructor. It is a cognitive approach which fails to recognize that much of the important learning in classes using the case method is going on at the effective level of feelings and attitudes. This paper will identify some of the psychological and group forces which apparently operate to affect the willingness and ability of students to contribute to problem-solving discussions. An approach will them be presented which can be used not only to minimize the impeding influence of these forces but also to enhance learning in the area of attitudes and interpersonal competence.

THE LOGIC OF GROUP PROBLEM SOLVING

Group problem solving is a central, critical activity in organizational life. Whether the group is a board of directors or the crew of an aircraft, decision making is increasingly becoming a product of the total group rather than the work of one individual. Problem solving is a goal-directed process that usually consists of a series of definite steps, beginning with the recognition of a problem or dilemma. These steps or activities in real life are rarely performed in any fixed order, nor is one subactivity completed before the next is considered. More often the process is a series of successive suggestions about what may be done. Clarity, detail, and focus tend to increase with each additional suggestion until a definition of the problem and resolution satisfactory to the group occurs.

This process of problem solving has much in common with that used by students in case method courses. Whether we are considering a task group or a student group, a rational-logical approach to problem solving assumes that the solution of a problem is not affected by, nor should one allow it to be affected by, personal feelings and needs or group forces. Participants are presumed to operate as a unified entity in a conflict-free environment. The interpersonal, emotional aspects of the process are viewed as an interference.

PSYCHOLOGICAL ELEMENTS IN CLASSROOM DISCUSSIONS

Available evidence about group processes indicates that there is in most student groups a great deal of hidden, irrational behavior. Such behavior is described as irrational not because of a lack of mental coherence on the part of the students, but because they exhibit much behavior that does not contribute maximally to the task confronting the class. Such evidence supports a behavioral approach to problem solving in student groups which presumes individual behavior to be influenced by environment, personality factors, and the actions of others.

Each student, with his individual characteristics and attributes, differs from others in his sensitivity to and perceptions of problem situations. He makes assumptions about the motivations and abilities of others, as well as of himself, which act to govern his thinking, feelings, and behavior. To illustrate some of the ways these individual differences affect classroom activity, some simplified examples of observed behavior will be described.

Fight-Flight. Not knowing how his participation in classroom discussions will be received by others presents a dilemma for some students. Rather than tackle the issue head-on, he often seeks safety in another approach--either fighting the issue or taking flight from it. In either instance he is motivated to preserve his self-image in the face of a threatening situation. If his tactic is to fight, he might argue, "I can't see any problem in this case. Why are we wasting our time with it?" Or he might suggest that he has had a personal experience in which the class might be more interested. Here, his motive is to steer the class away from the case at hand and get them on a subject with which he is more familiar. His intent is to engage the class in a tangential, meaningless discussion which will give the appearance of coping with the problem but is actually designed to keep the class away from the problem.

Dependency-counter dependency. In this bahavioral mode the student complains about the complexity of the problem and his lack of ability to deal with it. He presents himself as being in need of help and typically to deal with it. He presents himself as being in need of help and typically calls upon the instructor or a class member of high status and influence to step in and settle the issue. The person called upon is seen not only as a source of power but also as a source of help, and the appeal contains the ambivalent issues of both hostility and affection. For effective problem solving, the class must be able to determine openly whether the opinions of certain members are accepted because of their validity, or if the class is deferring to them for reasons irrelevant to the problem. Counterdependency is typically expressed through resistance tothe efforts of the other members of the class or a particular member who represents high status. Within limits, the counterdependent person serves an important problem-solving function; for the challenges the group's assumptions and stimulates elaboration, clarification, and deeper exploration of the group's position. How the group reacts to this sort of behavior has a direct influence upon their problem solving processes.

Pairing. Briefly, pairing refers to the situation in which a member is more interested in maintaining friendly relations than in working on the problem at hand. He seeks out one or two supporters and forms a kind of emotional subgroup in which they support and protect each other. One consequence of this behavior is the suppression of hostility within the group. When hostility must be suppressed, however, much of the group's problem-solving energy is diverted. By expecting and dealing with hostility as it occurs, a group conserves the physical and psychic energy available for problem solving.

<u>Inclusion</u>. The members of any class usually vary in the degree to which they feel that they are really accepted by the group and thus committed to achievement of its goals. Some are on the fringes--they are only peripherally involved. Others devote the major portion of their time and effort to the class activity--they are centrally involved. Others fall somewhere in between these two extremes. The individual's feeling of belonging greatly influences both the quantity and quality of his interactions with the other members of the class.

<u>Control</u>. In order for the class to employ decision-making processes, it is necessary for some members to influence or control other members to some extent. Some students are reluctant to attempt to lead or influence the group in a certain direction because they have double doubts about their overall leadership ability; they will offer ideas and suggest approaches only when they feel reasonably sure of their acceptance. Some attempt to persuade, influence, and control the beliefs of others because of their assumption that other members cannot make decisions for themselves. Discussion of leadership issues in the cases suffers as long as the leadership problem within the class is not analyzed.

<u>Affection</u>. If the class is to be an effective and satisfying learning experience for the student, he must be able to relate to other with sufficient warmth and closeness. If there is not enough freedom for him to express personal feelings about others, then the total class suffers because of the tie-up of energy in the suppression of hostile behaviors. While the problems of affection is a difficult one for males to handle, all too often things are kept on an impersonal basis because of a belief in the old military adage that "familiarity breeds contempt." Whether a student wants to relate closely to another or remain aloof depends upon his perceptions of the kind of relationship which may result.

The interpersonal needs discussed above are not inclusive; they merely reflect some of the personal concerns of individuals which are at times greater than their concern for others of for total class performance. Such interpersonal problems cannot be ignored, and the efforts of the class to work on objective tasks such as case discussions will be hindered as long as they remain unsolved.

A BEHAVIORAL APPROACH

Typically, case method courses are structured to promote the development of students' analytical and diagnostic abilities which hopefully lead to better solutions. The instructor remains largely in control of the rewards and penalties, thus, directly influencing the nature and extent of student participation. Implicit in this approach is the assumption that the feelings and attitudes of the students are not important and that little learning could result from examining them. The emphasis is made toward discussion of prefabricated data contained in the written cases about someone else's experiences. The strategy used in the classroom is the same as that used hierarchical formal organizations. Argyris has observed that in this kind of learning situation the students are provided with an experience that reinforces the very organizations and interpersonal factors and basic assumptions that are the causes of the problems they are studying.

In early 1965, initial planning began at the Air Force Academy on a case method course which was to emphasize the behavioral aspects of managerial problems being experienced in contemporary Air Force organizations. The objective of the course was to provide the cadet an opportunity to increase his leadership ability by gaining experience in making decisions concerning the solution to complex problems, by learning to communicate these decisions clearly and persuasively, and by learning to work effectively and cooperatively with others. Conceptually, the course was aimed toward the development of both intellectual and social skills--more effective ways of thinking, feeling and acting in the handling of day-to-day human problems. After much research, planning and observation of student participation in other case method courses at the Academy, two concerns loomed high.

First, analysis and discussion of cases along with correlated research findings and readings provide the student opportunity to develop the intellectual skills of analysing organized human behavior and preparing solutions to the cases. Little evidence was found, however, that students readily changed their behavior as a result of discussion case materials about the experiences and problems of others. Rather, it appeared that changed behavior was more likely to result when students became sensitive to their "here and now" feelings which were influencing present behavior.

The second concern for learning presented the need to create a classroom environment which was authentic in providing opportunities for exploring interpersonal relationships and their effect upon total class performance. Clearly, if the students are to take the responsibility for analysis and discussion of cases and to experience desired learning outcomes in the process, they need a favorable social environment for so doing. They must be willing and able to be open and authentic with each other and feel free to offer their suggestions and observations without feeling personally threatened by others reacting in the form of rejection, decision, or intolerant suggestions to think along other lines. They must also learn to pay attention to each other rather than to be preoccupied with their own emotional needs for status, security, attention, influence, or favor with the instructor. Status and ability differentials within the class must not act to block communication or to polarize opinion before each other, perhaps, more creative and acceptable alternatives have been explored. The problem is stated by two faculty members of the Harvard Business School as follows:

> "From the first class period on, the teacher needs to recognize that students will not acquire new understandings until they are ready to do so. They cannot superimpose new attitudes existing ones. The process requires change of the existing structure. Change must occur especially in certain attitudes that function as obstacles to learning. These attitudes take many forms according to the personality of the individual student."

In view of the agreed-upon course objectives, it was decided to modify the traditional case method format in order to look at the organization within the classroom as well as the ones described in the cases. This change was conceived as a way of focusing cadet attention on the relations which tended to naturally emerge in the classroom. Pedagogically, what was decided upon was a "laboratory attitude" which would make it possible for developments within the classroom to also become a focus of discussion and analysis. While allowing for differences in approach would result in a compatible relation and emphasis of the two foci. A brief, general description of the way this approach is used in the classroom follows below.

As this class engages in its regularly assigned case discussion, attempts are made to broaden the students' sensitivity to and understanding of what is taking place in the class. That is, we concentrate upon both the "content" and "process" of classroom activity. By concentrating upon both the content of the case discussion and the forces at play within the group, the class develops increased sensitivity toward group processes, greater awareness of the character of one's own participation, and increased ability to deal appropriately with a variety of group situations. Building on the concept that learning about others comes best from experiences with others and the analysis of these experiences, an effort is made at the end of each class period to look back at the performance of the class that hour. Representative concernes include: What communication patterns did we observe today? How did we go about the process of making decisions? Who appeared to influence class discussion most? Least? Was the participation balanced? If not, why not? What are our feelings about our role in this class? About the behavior of others?

No attempt is made to deny the differences that exist in the class. Rather, these differences are recognized, openly discussed, and accepted. What does the student learn from dealing with these problems? First of all, he is helped to see himself as others see him. He is provided feedback about his behavior which helps him to analyze his own personal qualities and, thereby, determine their facilitating or inhibiting influence upon self-growth and learning. From the group viewpoint, the ability to openly face and assess these problems enhances the confidence of the class.

As they become more aware of their assumptions, their needs, and their concept of self and a competent resource, they are better able to see why certain questions and not others are problems, why certain solutions and not other are appropriate. Instead of holding to the illusion that their personal needs and feelings do not affect problem solving, they now develop insight into what their needs and feelings are and how they do influence problem solving. By really looking at their own behavior and the assumptions behind it, they feel free to examine their own management style and to explore alternate ways of solving problems. Decision making is thus based on a wider range of possibilities.

It sometimes happens, however, that a particular student is highly resistant to observation of and feedback about his behavior. This resistance is expressed through defensive behaviors designed to protect him from what he perceives to be high risk-taking situations. Such defensive behavior is likely to continue until he feels that a supportive climate of trust and confidence is established which will permit him to be open with his feelings without fear of being hurt. One of the critical functions of the class is to identify and work with the problems of group norms and processes that might operate to produce defensive behaviors.

OBSERVE RESULTS

During the spring semester of 1966, classes in which this approach was used were compared to classes in which a more traditional approach was used. In the former classes, it was found that the students expressed a much higher level of motivation toward the course and a greater desire for learning and behavioral change. In addition to developing a greater ability to analyze and think through the problem situations depicted in the cases and to present and defend reasoned recommendations for corrective actions, they were also able to develop new understandings and skills of participation which are necessary for effective communication and interaction with others. The deepened their understanding of how individuals work together to accomplish individual and group goals. As members of a group, they consciously examined unquestioned assumptions about human relations.

SUMMARY

There is evidence that student participation in case method courses is directly influenced by personal needs and feelings. One method for overcoming or minimizing the dysfunctional effects on nontask-oriented behavior is to have the class focus upon both the "content" of the case and the process of what is going on in the classroom. Results of using this laboratory-type approach in a case course at the Air Force Academy reflected increased learning outcomes not only in the areas of intellectual and diagnostic skills but also in the areas of attitudes and interpersonal competence. By concentrating upon both the content and process of classroom activity, classes were able to develop sensitivity to their own needs and feelings and those of others.

# # #

October 7, 1980
ldg/

THE DELPHI PYRETHRUM GROWERS' CO-OPERATIVE

Naz Patni was not looking forward to the Annual General Meeting of the Delphi Pyrethrum Growers' Co-operative Society. He had been Chairman of the Society for a year and the results were very good. The Society had achieved a surplus of $3000 and Naz was certainly not worried that members would complain about the year's results. He was afraid that they would make it impossible for him to do as good a job next year, because they would want to share out as much as possible of the surplus. He believed that the Society should buy an automatic dryer, and most of the surplus would be needed to pay for it.

Naz was sure that the Society should not pay out more than $1000 or an average of $2 for each of the 500 members. He knew that the Pyrethrum Board was demanding better flowers every year. The members of the Society were still drying their own flowers on their farms, so that when they were delivered to the Board they were sometimes damp, and the pyrethrin content was low. Many other Societies had put in automatic dryers and their members had benefitted very much as a result. Naz had collected the following information from friends who had recently installed dryers in their Societies:

1. A suitable dryer would cost $2000 to buy and install

2. The Society could expect to improve the average pyrethrin content of its flowers delivered to the Board from 1.4% to 1.5% if they had a dryer.

3. It would cost about $1500 a year to operate a dryer. This would include fuel, maintenance and the necessary labour

4. The dryer should last for at least five years with reasonable care and maintenance.

Naz knew from the Delphi Society's records that last year they have sold a total of 100,000 kgs. of pyrethrum flowers, with an average pyrethrin content of 1.4%. This made 1,400 kgs. of pyrethrin, and the Board had paid $20 a kilo, or a total of $28000 to the Society. The Board had guaranteed that the price paid for pyrethrin would not be lower than $20 a kg. for a least three years, and the Delphi growers aimed to increase their production of flowers in the future to take advantage of the good prices.

The members of the Delphi Society had heard about the good results and the large surplus, but Naz knew that they intended to press for a payout of at least two thirds of the $3000 surplus. This would give each member $4, but if $2000 were paid out in this way, it would not be possible to buy a dryer. The Society had already borrowed up to its limit from the Co-operative Bank for vehicles and other facilities. Naz thought that if the members received $4 each this year, they would never be willing to accept less in the future, so that the Society would never be able to grow by investing its surplus in better services for the members.

....

Suggested Analysis of the
Delphi Pyrethrum Growers' Co-operative

Naz Patni is faced with two problems - first, to decide what to do; second to convince the members that the decision was correct.

He must therefore start by trying to estimate the value of the costs and benefits of such an investment. His own opinion may be borne out by this analysis, but in any case it would be necessary in order to persuade his fellow members.

COSTS:

1.	The dryer itself will cost \$2000. It should last at least five years. It will therefore be reasonable to write down one fifth of the \$2000 as the cost of the dryer for one year.	\$ 400
2.	Annual operating expenses are estimated to be	1500
3.	Total cost per year will therefore be about	\$1900

BENEFITS:

If production was not increased, and if the pyrethrin content only rose from 1.4% to 1.5%, the Society could expect to sell 100,000 kgs. of flowers, at last year, and to realize a total of 1,500 kgs. of pyrethrin from the crop. At the guaranteed price of \$20 per kilo, the Board would pay \$30,000 for these flowers.

This will be \$2000 better than last year.	
Additional annual revenue is estimated to be	\$2000
Additional annual cost is estimated to be	\$1900
Additional annual surplus is therefore estimated to be	\$ 100

There are 500 members of the Society, and the additional annual surplus will only amount to 20 cents each. They may argue that the \$2000 would, if divided among them, give each member a cash sum of \$4. Would this not be of more use to them than an annual amount of 20 cents each? Naz can use the following arguments to press the case for the dryer:

1. The members were already planning to increase the production of flowers, and the improved pyrethrin content would lead to a greater surplus from the increased production.

2. If they had a dryer, members would probably be able to spend more time cultivating their crops, and would therefore produce more flowers, of better quality.

3. The Pyrethrum Board was demanding better flowers every year. Without a dryer the Delphi Pyrethrum Grower's Co-operative Society might find its flowers unacceptable at any price.

Naz must present the figures tothe Society members, and back them up with these points. By analyzing the situation in this way, he has confirmed his own opinion that the dryer should be bought, and given himself material with which to convince his members.

Many difficult business problems become far easier if an attempt is made to value as many of the coasts and benefits as possible. This is the only way in which it is possible to compare them with one another, and to find out whether the final result of any decision is likely to be more or less profitable than any other. Some costs or benefits, such as final arguments in favour of a dryer, are difficult or impossible to value if money terms. This makes it all the more necessary to try to value all the others, so that attention can be concentrated on the few final factors which may or may not lead to a decision different from that indicated by the financial calculations.

# # #

ldg/
October 23, 1980

Higher Diploma Course in Cooperation (HDC)-India
-Examination System-

Dr. S. C. Mehta, Professor
Vaikunth Mehta
National Institute of Coop.
Management
PUNE, (INDIA)

India possesses a very impressive cooperative training complex with one National Institute of Cooperative Management at Pune, 16 Coop. Training Colleges in different states and 76 Coop. Training Centres at Junior level. All these institutions are run under the auspices of National Council for Cooperative Training, New Delhi. The Cooperative Training Colleges conduct a number of diploma courses in different sectoral areas of which the most prestigious course is Higher Diploma in Cooperation which has been recognized by the Govt. of India and also by a number of State Governments for service in cooperative field, both in the Government as well as in the institutional sphere. The Higher Diploma Course (HDC) is for a duration of 36 weeks of which 8 weeks are earmarked for Practical Training and the rest 28 weeks are devoted to In-campus Training. The practical training is also divided into 2 parts:

1. Field Studies: These are organized for 4 weeks in which the trainees are to study the working of a number of different institutions in parts of the country which are well developed in the cooperative field.

2. Field Placement: In this training, the trainees are attached to two or three cooperative institutions where they have to work under the guidance of the officers of the cooperatives. The Institutions selected are in those areas from which the trainees hail.

HDC Course is divided into 7 theoretical subjects:

1. Cooperation and Planned Development
2. Cooperative Credit and Banking
3. Function and Working of Non-Credit Cooperatives
4. Cooperative Law and Allied Laws
5. Cooperative Accounts
6. Cooperative Audit
7. Principles and Practices of Cooperative Management

The evaluation for the HDC course is done in the following manner:

A total marks of one thousand is reserved for assessment of the course which are alloted as under:

720 for Theoretical Evaluation
130 for Practical Training
100 for Co-curricular Activities and
50 for Viva Voce.
1000

These marks are further sub-divided as under:

1. Theoretical training:

	Subject	I Test	II Test	Final	Total
I	Cooperation and Planned Development	5	5	50	60
II	Coop. Credit & Banking	10	10	100	120
III	Functions and working of Non-Credit Coop.	5	5	50	60
IV	Coop. Law and Allied Laws	10	10	100	120
V	Coop. Accounts	10	10	100	120
VI	Coop. Audit	10	10	100	120
VII	Principles and Practices of Coop. Management	10	10	100	120
	TOTAL				720 Marks

2. Practical Training (Total 130 Marks)

Field Study	Field Placement	Adopted Societies	Working in Consumers' Store
50	50	15	15
Divided as (Written -test 30 Tour -Notes 20)	Divided as (Written Test) 30 Tour Notes 20)		

(Total 100 Marks)

3. Co-curricular Activities

Group Discussions	Assignments Studies including Book Reviews.	Debates & Seminars
20	50	10

General Behaviour

20

4. Viva Voce 50 Marks

Ranking:

The categorization or ranking of trainees is done in the following manner:

1.	Less than 40%	- Poor (fail)
2.	40% and above but below 50%	- Fair
3.	50% and above but below 50%	- Good
4.	60% and above but below 70%	- Very Good
5.	70% and above	- Excellent

Grace Marks:

A trainee has to get a minimum of 40% marks in the aggregate for passing in the HDC course. But hemay get only 35% marks in individual subjects for passing. There is also a system of awarding of grace marks to the trainees if they fail in only one subject. The grace marks are 3 in case of papers which carry more than 75 marks, plus one additional mark for each one percent gain above 40% to the maximum of 5. For instance, if a trainee fails in one subject, but gets 43% marks in the aggregate, he may get 3 ≠ 3 as grace marks in the subject. In this case, a maximum of 8 marks can be awarded. For those papers which carry less than 75 marks, the failed trainee can be awarded two marks plus one mark for each one percent gain above 40%, to the maximum of 3. In such a case, a maximum of 5 marks can be awarded. But in no case, the award of grace marks can be allowed to improve the category of a trainee.

Re-examination:

Those who fail in the aggregate, despite the award of grace marks, have to appear in all the subjects again. Similarly, those who fail in the practical training or viva voce have to come again for the final examination. But those who fail only in one or two subjects, while passing in the aggregate can appear in those subjects only. All failed candidates have to clear the examinations maximum in next two years.

Examination Board:

There is no system of centralized examination in the National Council for Coop. Training because of differences in regional languages. India has 14 languages recognized in its Constitution which are even medium of instruction in different States. Half of the papers in the final examination (theoretical papers) have to be set by the lecturers of the same college, while the rest half have to be set by outside examiners. There is a panel for examiners approved by the NCCT from which outside examiners are selected by the Local Committees, constituted at the level of the Colleges. These examiners should posses either teaching experience or some years' practical experience in the field. There is an Examination Board, constituted at the National Council for Coop. Training, to consider technical matters which arise in respect of examinations in 16 Colleges in the country. It also looks after and takes action in case of reported malpractices at the examinations. The invigilation of the examinations conducted at the colleges is looked after by the staff of the individual college.

Other Diploma Courses:

Besides the Higher Diploma Course in Co-operation, running for 36 weeks, we have a shorter version, known as H.D.C. (condensed) in which only those with a minimum experience of 3 years in the Co-operative Department or a Co-operative Institution, are eligible for admission. This is a course only for 18 weeks. In this case, the seven subjects are reduced to five, by combining Credit and Non-credit Co-operation (Papers II & III) and also Accounts and Audit (Papers V & VI) and dropping Field Placement Tour. The total marks are reduced from 1000 to 500, but the general pattern of marking is more or less the same. The Colleges are organizing several other functional Diploma Courses in the sphere of Marketing, Consumers, Banking, Industrial, etc. But in these cases also, the pattern remains the same.

# # #

kdg/
October 21, 1980

COOPERATIVE TRAINING COLLEGE, SRIPATTAN
(a management case)

Background Note for the Teacher

1. Teaching Objectives:

The main purpose of teaching with this case is to orient the participants about the teaching objectives in a College and how the teaching can be made more effective so that it would be relevant for the development of the Cooperative Movement and cooperative institutions.

2. Target Group:

This course is meant for the class of trainees basically in the cooperative training institutions and mainly for the staff of the Cooperative Training Colleges.

3. Duration of the Session: 2 hours.

4. Identification of problems:

The basic problem which emerges from the discussion of the case is "How to make the training in a cooperative training college most effective and fruitful". The other problems which ensue and are allied to the main problem are: -

(1) How to make the training more relevant to the jobs of the participants in cooperative business institutions?

(2) How to utilise new techniques and to conduct more research in the training programmes?

(3) How to make the practical training more effective?

(4) How to ensure that the training imparted to participants is put to maximum use when they go back to their jobs after the training?

(5) How to delegate more powers to the Principal for better effective administration of the College and Training Programmes?

(6) How to get proper feedback from the participants and from their sponsors, in order to measure the effectiveness of training and regular improvement, as a result of the approval.

5. Analysis and Solution

The main problem which has been diagonised above is to make training more effective and purposeful. The College is taking a lot of measures like keeping in contact with the participants, and with the sponsoring institutions in order to know their reactions about the quality of training and to gauge how far the training is relevant to the job situation. Before framing of the courses in the calendar of programmes, suggestions are invited from the client institutions and sometimes fresh need-based courses are also added to the calendar on the demand of the cooperative department or cooperative institutions.

As regards the staff, it is a mixed one: two lecturers are drawn from the field, four are directly from the Universities while the other four have been recruited for the College with some years of field experience behind them. They have tried to utilise new techniques of teaching with the limited time and funds at their disposal.

One important factor which marks the effectiveness of training programs is improper selection of trainees. The selection of trainees is generally not in the hands of the college and they are deputed by the sponsoring institutions. Some times persons who are not fit for anything or prove a nuisance are sent for training. There are also no incentives for the trainees, to be serious about their courses because after going back they are not benefitted monetarily or in the shape of promotions as a result of their training. Further, after the training is over, they may be posted for any other job with the result that the whole training goes waste.

Again, when a trained officer works under an untrained supervisor, he is at a considerable disadvantage, as all the innovations and improvements suggested by the former, often rigg no chord in the heart of the other. It will be necessary that some power must be given to the College to reject trainees who are not suitable and career of the trainees must be effected by the grades obtained by them in the Course undertaken by them. This will induce the trainee to take more interest in his Course. The low performance in the Industrial Course is mainly because of their poor selection of trainees and nothing else.

The imparting of more powers to the Principal will give him some latitude in moulding the training programmes according to the needs of the clients. Today he has to wait for months for getting clearance from the Head Office. It is also essential that more finance should be provided for Research and adopting of new teaching techniques, and more staff should be appointed for this purpose. To make practical training more effective, some honorarium should be provided to the trainers in the field and new orientation should be given with regard to practical training in adopted societies and consumer stores.

Taking the total picture it is clear that most of the sponsoring authorities like the training imparted by the college and are appreciative of their work. They want more programmes to be conducted by the College, as they have found them useful. But the most important solution in this respect, besides the suggestions made above, is to establish an intimate rapport with the Registrar, Cooperative Societies and senior officers of the sponsoring institutions. He is the person who is looking after the development of the Cooperative Movement in the state and with his cooperation, the Principal can get the maximum facilities and assistance in his training work and also get real feedback for further improvements of the programme. If this is done, this will have a salutary effect of the Head Office also because they measure the performance of the Principal or the College, according to the favourable notices that he gets from the Registrar, Cooperative Societies or head of the State-level Institutions. This will enable the Principal to get speedy clearance of all his proposal from the Head Office.

6. Solution adopted by the Management:

The Principal is going ahead with the steps for establishing more intimate contact with the Registrar, with apex institutions and other concerned departmental and institutional officers. More and more officers are invited to deliver talks to the trainees on real field situations. The trainees are also now better cared for now by the officers in practical training programmes. As regards the problem of low grades obtained by the participants of Industrial Course, the Principal simply wrote back "If the selection of trainees is bad, no amount of training input can correct it" and there the matter ended.

7. Suggestions of the conduct of discussion:

This Course is a little complicated, in the sense that the participants may take the tail or the head or ear of the animal for the elephant, though other aspects are also important. They have to be brought around to the view that the main issue is how to make the training more effective. Other issues revolve around this main problem.

As regards solutions also, all the solutions suggested above are important but the main thrust should be to establish intimate contacts with the users of the programme and particularly with the Registrar, for constant improvement of the quality of the training.

###

/sml

THE UNSINKABLE CREDIT COOP INC.

A CASE STUDY

SUBMITTED BY:

1. Sylvia de Lara
2. Corazon Mabayos
3. Sister Lina Despojo
4. Lennie C. Manzano
5. Winnie D. Medina
6. Philip Andrada

SUPERVISOR:

Doming C. Punzalan

The Unsinkable Credit Cooperative

On April, 1961, thirty seven (37) faculty members and employees of the APC Colleges and neighboring institutions assembled to consider the formation of a cooperative society to promote thrift among its members, build up loanable funds to make credit on reasonable terms available among themselves and get educated in sound money management. After its registration on May 3, 1961, the cooperative commenced its operations. The pioneering members were loyal and hardworking in their credit cooperative. In a few years time the management noticed their members were increasing and everybody showed interest toward the cooperative. Everything was sailing smoothly but unknowingly some smart individuals (non-members) in the vicinity were threatening some members and even went to the extent of attacking the cooperative management sarcastically and with destructive comments. Happy were the members when they found out why they werethreatened that way when they heard about the complain. The members found out that these smart individuals were Mr. Usurer and Mr. Loan Sharks. The indifferent attitude of Mr. Usurer and Mr, Loan Shark was due to the fact that since the credit cooperative was established, the number of people asking credit from them decreased tremendously. This made the management alert and it formulated new policies and changed the absolete ones. In spite of these, there were some years that the credit cooperative was bound to collapse. Records showed the decreasing number of members but this did not necessarily affected the management. (Please see Exhibit A). As years went on, operation still continued and massive campaign on membership was given priority.

The rapid growth of the membership can be attributed to the dedication and enthusiasm of the efficient Board of Directors. However, this sudden increase in the number of membership marked the beginning of the diversification and complexities in work of the cooperatives employees and increased the rate of delinquency among members. To date, the total membership is 1,307.

The office is manned by 5 regular staff, the treasurer, bookkeeper, accountant and 2 clerks but surprisingly nobody is designated to take charge of the office who could supervise and manage the operation.

There are times when the employees could not cope with the demands of all the members because of the heavy load of work they have to attend to. This was misunderstood by the members causing them to feel uneasy, unaccommodated, dis-associated from their very own organization. A number of members even resorted to resigning unhappily. The growing antagonism of the members against the cooperative employees was felt by Miss Lina Dimalubog as she knew she was daring her best to contribute to the success of the coop, she could not imagine how things were turning-up. She could vividly recall the incident that happened between her and a member. The dialogue was as follows:

Member : Good afternoon. Can I have a loan application for ? I want to renew my loan.

Treasurer: Ah, yes, Cora. Come on, sit down first. It's been a long time since you last came here. How are you ?

Member : Here your compadre has thought of a project, and we need some money to finance it. You know, with this oil crisis, life is getting harder. We should think of ways to supplement our basic income.

Treasurer: I see - you may need a co-investor. May I ? Sylvie - please give a farm to Cora. So you still have any loan balance.

Member : I've made four payments already. We feel that the project is highly profitable - and will be a real income provider.

Treasurer: You mean, you have not paid yet half of your loan. Then I'm sorry. You can't renew yet your loan.

Member : But just last night, Uncle Philip (President of the Board of Directors) was at our house and he told me I can get money from this coop.

Treasurer: Ah yes - but maybe he was not aware that you have a 50% loan balance.

Member : It cannot be !! He even asked me how much I borrowed and how much have I paid. When I gave him my answers- he told me to see you. Now, what's the problem.

Treasurer: Look, Cora, you've got to understand. It is the boards' policy that no loans can be renewed till 50% of the amount borrowed is paid. Now, if I let you - I'm definitely violating a policy and besides this will set a precedent. It will be unfair to other members who are in the same situation if I refuse them.

Member : I told you - we need money to finance the project. You even wanted to join us. And Uncle Philip has the GO-signal. I guess you are making it harder.

Treasurer: Cora, please ... be careful with your words. I'm only implementing the board's policy. Don't charge me.

Member : Sh - I've heard a lot of things about you. I didn't want to believe them - ' Coz I know you. We're friends. But I'm beginning to change my mind.

'reasurer: And, W-h-a-t do you mean ???

'ember : The numerous complaints about you are confirmed today. No wonder, so many members are leaving. Tomorrow, I'll file my resignation letter. Had, Uncle Philip will surely....

The two other employees - Winnie and Lennie who were busy on their respective work were shocked with the loud B L A M of the door. Then they heard their boss - Lina exclaimed - "This is too much ! I'm always implicated ! I will write the board about this." See exhibit E

INDICATORS OF GROWTH AND PERFORMANCE OF THE UNSINKABLE CREDIT COOPERATIVE, INC.

YEAR	NUMBER OF MEMBERS	INCREASE OR DEGREASE OF MEMBERS (%)	TOTAL AMT. OF LOAN GRANTED	GROSS INCOME	INCREASE OR DECREASE OF GROSS INCOME (%)	TOTAL EXPENSES	NET SAVINGS	RATE (%) OF FIXED DEPOSITS	INTEREST ON SAVINGS DEPOSITS
1961	173	-	₱ 40, 46	₱ 1,888	-	₱ 631	₱ 1,257	₱ 8.00	₱ 4.00
1962	310	44.19	247,000	10,010	81.14	3,263	6,747	8.00	4.00
1963	431	39.03	325,718	19,993	49.93	8,960	11,033	8.00	4.00
1964	556	22.48	400,975	27,326	28.72	11,942	15,384	8.00	4.00
1965	621	10.46	408,345	27,843	1.86	13,336	14,507	8.00	4.00
1966	619	- .32	453,907	33,463	16.79	11,820	21,643	5.85	4.00
1967	651	4.91	446,283	33,723	- 1.02	17,341	15,782	6.13	4.00
1968	653	.30	431,422	31,980	3.57	19,333	12,647	4.33	5.75
1969	657	.60	410,943	32,520	1.66	19,147	13,373	3.90	5.75
1970	546	-20.32	421,195	34,127	4.70	21,084	13,043	4.13	5.75
1971	529	-3.29	364,462	22,683	-50.00	17,783	4,900	1.50	5.75
1972	400	- .32	406,610	26,892	15.65	18,086	8,806	3.07	6.00
1973	441	9.29	428,411	32,157	16.37	18,698	13,459	6.00	6.00
1974	529	16.63	375,542	28,469	-12.95	19,530	8,939	8.00	6.00
1975	723	26.83	673,060	54,358	47.62	23,200	31,158	10.00	6.50
1976	1,003	27.91	1,083,251	90,241	39.76	34,698	55,543	10.00	7.50
1977	1,316	23.78	1,544,843	145,782	38.09	56,707	89,074	11.00	7.50
1978	1,661	20.77	2,325,085	223,770	34.85	99,865	123,904	12.00	8.50
1979	1,732	4.09	2,904,379	270,296	17.21	123,441	146,855	12.00	8.50
1980*	1,807	4.15	329,388	218,994	-23.42	77,007	141,986	-	-

* As of August 31, 1980

EXHIBIT B

THE UNSINKABLE CREDIT COOPERATIVE, INC.

October 15, 1980

The Board of Directors
Unsinkable Credit Cooperative, Inc.
ABC Colleges

Gentlemen:

I am writing to you to express my sentiments which I have been suppressing for quite a long time. It has come to a point that I could no longer endure such feelings that I thought it proper to communicate with you.

As a treasurer of the credit cooperative I have tried hard to perform task to the best of my ability. Although I have to admit that I have also been susceptible to errors as every human being is; However, my perform-aance has been blemished and I seemed to have lost credibility among our membership with the chairman of the Board's actuations and dealings with the chairman of the Board's actuations and dealings with them. . . in order to please them ... at my expense.

I know he is aware of the policies, rules and regulations of our cooperative and I am directly involved in implementing them. But to my distress, he has been ingnoring them and instead entertaining complaints from the members making me appear as the culprit.

There are innumerable instances I can cite and I know he can recall when he has entertained members complaints instead of explaining to them that we have policies, rules and regulations to follow. I would expect him as my immediate boss to protect me officially by adhering to our policies and justify and stand against the members. I have encounter with because of breach of policies, rules and regulations.

To resolve all these I have decided to seek the advise and help of the Board members to take this matter up with you. By this I hope to get a reaction for my complaint and settle once and for all difference for the good of the organization.

Very truly yours,

A. PASANGCRUZ

LINA DIMALUBOG

EXHIBIT

THE UNSINKABLE CREDIT COOPERATIVE, INC.
ABC Colleges

PAYROLL

Designation	Salary/Wage Per Month	Deducation		Net Amount Received	Signature
		SSS Premium	Medicare		
1. Treasurer	₱1,184.00	₱33.30	₱7.50	₱1,143.20	________
2. Accountant	1,006.00	33.30	7.50	965.20	________
3. Asst. Bookkeeper	763.00	26.70	7.50	728.80	________
4. Clerk-typist	722.00	26.70	7.50	687.80	________
5. Account-clerk	600.00	20.00	7.50	572.50	________
TOTAL	₱4,275.00	₱140.00	₱37.50	₱4,097.50	

I hereby certify that I have paid to each employee whose names appear on the above payroll the amount set opposite his/her name.

LINA DIMALUBOG
Treasurer

EXHIBIT

THE UNSINKABLE CREDIT COOPERATIVE, INC
Loans Granted vs. Loans Collected
January to August, 1980

MONTH	LOANS GRANTED		Total Loan Granted	LOANS COLLECTED		Total Loans Collected	% of Payment Recovery
	Petty Cash	Loans		Petty Cash	Loans		
January	₱15,460.00	₱161,561.00	₱177,021.00	₱16,725.00	₱126,488.73	₱143,213.73	80.90
February	17,600.00	307,554.00	325,154.00	19,740.00	348,221.67	367,961.67	113.16
March	16,700.00	301,757.00	318,457.00	15,175.00	248,565.81	263,396.67	82.71
April	18,350.00	274.067.00	282,417.00	14,660.00	223,195.51	237,855.51	84.22
May	16,100.00	305,390.00	321,490.00	14,570.00	270,301.00	284,871.00	88.60
June	31,450.00	325,392.00	356,842.00	20,165.00	277,035.43	297,200.43	83.28
July	22,150.00	327,824.00	349,974.00	13,825.00	287,653.61	301,478.61	86.14
August	28,850.00	300,538.00	329,388.00	21,020.00	261,376.00	282,396.00	85.73

EXHIBIT

The Unsinkable Credit Cooperative, Inc.
ACB, College, Laguna

Statement of Financial Condition
As of August 31, 1980

ASSETS

CURRENT ASSETS		
Cash in Banks (CBRB & FSB)	₱ 12,498.79	
Petty Cash Fund	10,000.00	
Due from Accountable officer	17,317.37	
Loans Receivable	1,998,063.10	
Petty Cash Loans Receivable	102,307.50	
Prepaid bond	105.26	
Unused office supplies	760.00	₱ 2,141,052.02
Investments		
UPLB Consumer's Coop	₱ 30,000.00	
NPC	5,000.00	
CISP	1,000.00	
CRBL	1,000.00	
Coop Services	200.00	
PNCB	10,000.00	47,200.00
Fixed Assets		
Office Furniture & Equipment	₱ 30,785.91	
Allowance for Depreciation	19,151.68	11,634.23
Total Assets		₱2,199,886.25

Liabilities - Member's Equity and Reserves

Current Liabilities		
Savings Deposit	₱ 410,066.11	
Due to CETF	7,207.61	
Loans Payable (CDLF)	100,000.00	
Interest on Savings Deposit Payable	19,638.68	
Interest Payable	1,334.00	
Due to SSS	140.00	
Due to Medicare	37.50	₱ 538,423.90
Members' Equity and Reserves		
Fixed Deposit	₱1,447,660.39	
Reserved Fund	64,915.11	
Educational Fund	(1,443.85)	
Audit Fee Reserved	875.94	
Guarantee Fund	7,300.89	
Interest Equalization Fund	167.31	
Undivided Net Savings	141,986.56	1,661,462.35

Total liabilities & Networth ₱ 2,199,886.25

Prepared by:

(SGD.)
Accountant

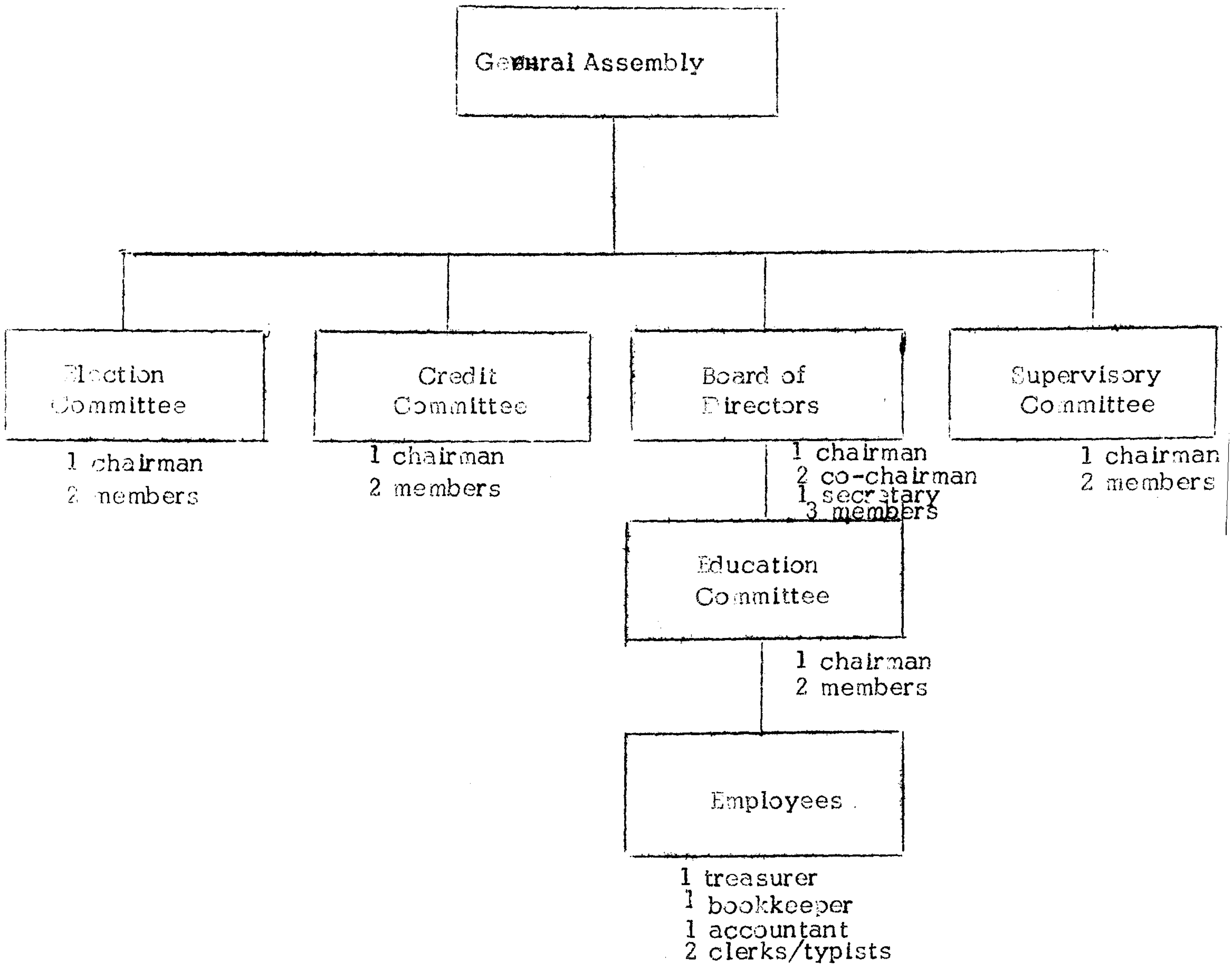
NOTED:

(SGD.)
Treasurer

EXHIBIT

The Unsinkable Credit Cooperative Inc.

Organizational Chart



A Case Study

THE FUNDOWALAH CONSUMERS COOPERATIVE
A Boon or a Bane

GROUP TWO

Team Leader	:	Amado B. Torralba
Members	:	Julita Lopez Daisy Belle Marte Romulo T. Martin Eleanor C. Manzano Winifrida D. Medina
Supervisor	:	V. U. Quintana

Submitted as a partial requirement for graduation in Training Methodology and Techniques for Cooperative Teachers in the Philippines, October 6-November 5, 1980

THE FUNDOWALAH CONSUMERS COOPERATIVE
A BOON OR A BANE

Miss O. Kontento, the manager of the Fundowalah Consumers Cooperative was rejoicing in the turn of events especially in the financial status of the society. Having been with the cooperative for about 22 years, twelve years as manager she was entertaining the feelings that she was just unfolding the prime years of her life - efficiently and effectively managing the cooperative operations.

THE FCC: How it all started

The Fundowalah Consumers Cooperative, the first of its type ever established in the Philippines, was organized in 1916 by a handful but pioneering professors, administrators and resident of Dunong University, a state institution specializing in agricultural education.

Generally aiming to stabilize prices of commodities in the community by providing members as well as non-members with quality goods, services and other requirements, the cooperative operated with a meager initial capitalization of ₱4,000.00 raised by the members from among themselves.

With the high academic qualifications of the initiators coupled with laudable society objectives, the organization for several years continued in operation with no remarkable growth. It was able to meet satisfactorily the demands of its members and later gained the acceptance among the University population, especially the studentry.

A high-voltage dynamism, however, came in with the entry of young breed professionals which triggered unprecedented growth of the cooperative. Its business boomed. From one-section operation, i.e. the grocery, the cooperative store expanded to a multi-section enterprise. Aside from the grocery, the coop established the canteen, photo supplies, book and school supplies and novelty sections. Later, the cooperative opened the Little Coop, a branch store strategically located near the drill grounds of the University.

Meanwhile, in response to the growing needs of the members, the cooperative acquired dealership rights which proved to be a profitable venture. Selected products like Gestetner lines and Master Oven were the first among the products exclusively sold by the cooperative.

The diversification of services produced a chain of positive results as more people joined the cooperative. Sales increased which resulted in higher income of the cooperative.

The 1977 to 1979 Operations

In 1977 membership rose to 709 with a paid-up capital of ₱61,730.00. Total sales amounted to ₱1,823,130.68 with net savings of ₱68,470.36. These figures motivated the Board of Directors, the members of the various committees, the manager and other key personnel of the cooperative to further commit themselves to the continued growth and progressive position of the cooperative. Policies and plans dealing on membership campaign, share capital contribution, sales planning and market strategies and even streamlining operations were programmed by the Board.

During the general assembly of the cooperative in 1979 many were gleefully looking at the comparative financial statement (see exhibits Ia and Ib) submitted by the manager. Among others, the Board of Directors noticed the upward trend of the business evidently presented in the reports which elicited a feeling of "disco fever". An exceptional level of enthusiasm among the directors was maintained throughout the meeting. Understandably it was so, because the meeting was highlighted by the report of the President containing the following items, namely:

1. The paid-up capital as of December 31, 1979 was ₱115,840.00 compared to ₱70,705.00 in 1978 and ₱61,730.00 in 1977.

2. The net income in 1979 was ₱82,223.61 from a total sales of ₱2,109,758.07 with a large part of the income coming from dealership and commissions.

3. An increase of ₱45,145.00 in paid-up capital went to the relocation of the book and school supplies section, office of the Manager and staff, provision of a conference room and construction of the Little Cooperative. The total investment was ₱67,000.00

4. The net income for 1979 was distributed as follows:

Item	Amount	% of total
General Reserve Fund	₱ 8,222.36	10.00
Educational & Reserve Fund	7,400.12	9.02
Interest on Capital	9,334.00	11.35
Patronage Refund	51,792.64	62.99
Land & Building Res. Fund	5,474.49	6.64
Total	₱ 82,223.61	100.00

The report was followed by interesting discussions on the activities of the cooperative. As the Board of Directors was in high spirits, highly innovative and profitable ideas flowed in. Plans and programs were drawn-up to cope with the fast growing operation and service and further to improve the efficiency of the cooperative. Some of these are:

1. increase in capitalization
2. expansion of warehouse
3. lowering of mark-up prices
4. provision of cash purchase discounts
5. training of cooperative personnel
6. cutting down of operating expenses

In the mid-year (June 30, 1980) report, (see Exhibit II) the "brains" of the intellectual directors once more proved to be real money-maker. The income reflected a net of ₱70,798.06 against its total sales of ₱1,208,824.38. Miss Kontento, the manager, was overwhelmed by the development as the report on sales was almost equal to the previous year (1979) earning of the cooperative. She was so engulfed by her "achievement" that she did not notice Mr. C. Kunsensiya, her conscientious accountant, who has slipped inside her office and was already seated infront of her table. For sometime Mr. Kunsensiya let his manager happily wallow in her day dreams for he understood the "glory" that was exuding from Miss Kuntento. He has been working with her as part-time accountant for sometime so he had developed in him a deep understanding of the "what", "where", "when", "why" of her Manager.

Mr. Kunsensiya: "U-r-m..:u-r-m-m....(with a voice like that of Barbra Streisand, the Manager brought back herself to the world).

Miss Kuntento : Ah! My dear Mr. Kunsensiya, I'm terribly sorry I didn't notice you're in. As you can see I'm so delighted with our financial reports. Anything that I can do for you?

Mr. Kunsensiya: I'm glad the financial reports are making you happy. But...

Miss Kuntento : Of course, of course, I'll say we're making real good this time. We made good in our dealership project. Even our dealership supervisor was pirated by our supplier. And on top of everything, even with competition outside the campus our photo section raked in money.

Mr. Kunsensiya: What about our Little Coop? The main canteen?

Miss Kuntento : Ah! the LC, our little coop made a big performance. I think we're correct when we decided to open it even if it could mean a shift of our financial resources that had impaired a little our operating capital.

Mr. Kunsensiya: That ₱67,000.00 we spent putting up the Little Coop, did it bother so much your main store operations?

Miss Kuntento : No. Indeed. But I'm a bit worried about our purchases for the holidays.

Mr. Kunsensiya: I hope I'm not pessimestic. But this seeming shortage of operating capital our treasurer said to me one morning when he is about to deposit to the bank has alarmed me.

Miss Kuntento : Forget what our treasurer has said. I know that we're liquid.

Mr. Kunsensiya: Do you know that the bank and some of our creditors are pressing for the collections of our due accounts? I'm fearing, for they can be a pain in the neck.

Miss Kuntento : Are we going to pay these accounts now?

Mr. Kunsensiya: Yes, if we have the money but your cash in bank is low.

Miss Kuntento : Leave it to me. I'm wizard you know, we can pay them! Isn't that possible to have a pre-x'mas sale of goods stocked up there in our bodega? Its old stock, we can have a bargain sale.

Mr. Kunsensiya: Precisely. Remember we're nearing the holiday season. A sale can mean additional funds for our holiday purchases. At last, we can settle our maturing obligations little by little.

Miss Kuntento : Do you remember the budget I've shown you? I have included the 13th month bonus for our employees in it. You too have a bonus.

Mr. Kunsensiya: Thank you for that.

Miss Kuntento : Before I forget, can you ask the treasurer if my commission check is ready? I have a sick friend and I promised to settle her hospital bills. How much is it?

Mr. Kunsensiya: ₱4,519.02 for June 30, 1980 only.

Miss Kuntento : I've got to double it before the year ends. No sweat!

Mr. Kunsensiya: But I'm still worried about our finances, seemed to be good only in papers but not for real .....

Miss Kuntento : Ah, Come on! Don't let these things eat you up. Actually there's no problem. I've been in this Coop for 12 years as a manager and still the coop is here - growing. Leave everything to me, Okay, let's have some snacks.

Mr. Kunsensiya stood up to follow his manager. Back of his mind his thoughts outraced the pace of his footsteps and the sounds he heard were not the ckickity of his shoes but the pounding in his head which said: This cooperative is in the threshold of growth and development but in its path sprout the seeds of amassing difficulties and problems of a booming business ..... prospects are bright. But I'm lost ..... I'm confused..... Our business, is it a boon, is it a bane! Ahhh, Qou Vadis, Fundowalah Consumers Cooperative?

*****

:nmb/cma-101880
a c c i

EXHIBIT I-A

FUNDOWALAH CONSUMERS COOPERATIVE
Comparative Balance Sheet
December 31, 1977, 1978, 1979

ASSETS

Current Assets:	1977	1978	1979
Cash on Hand	₱ -	₱ 818.45	₱ 3.95
Cash in Bank	12,217.82	(3,585.44)	341.80
Accounts Receivable-Trade	27,558.55	27,088.27	25,803.07
Rent Income Receivable	-	110.00	-
Advances General Manager	4,700.57	19,700.57	19,700.57
Savings Deposit	162.97	162.97	-
Prepaid Insurance	-	623.05	1,095.10
Deposit for Empty Bottles	1,940.88	1,940.88	1,940.88
Deposit for M. Gas	4,259.50	4,259.50	4,259.50
Deposit for Mobil Flame	350.00	350.00	350.00
Printing and Developing	10,562.00	16,643.39	23,708.03
Kitchen Utensils	-	208.00	208.00
Supplies Inventory	7,011.57	11,007.64	7,139.84
Merchandise Inventory	256,681.38	226,848.82	279,520.07
TOTAL CURRENT ASSETS	₱325,445.24	₱306,176.10	₱364,070.81
Fixed Assets:			
Office Equipment- Furn. & Fixt.	₱ 37,407.22	₱ 37,957.22	₱ 39,637.22
Less: Reserve for Depreciation	27,121.02	29,395.37	30,727.37
Net	₱ 10,286.20	₱ 8,561.85	₱ 8,909.85
Building & Building Improvement	₱ 42,830.52	₱ 53,580.57	
Less: Reserve for Depreciation	21,436.12	23,783.94	-
Net	21,394.40	29,796.63	
Building (Little Coop)			₱ 10,000.00
Delivery Equipment (Trakbayan)	₱ 23,300.00	₱ 23,300.00	₱ 23,300.00
Less: Reserve for Depreciation	2,912.48	5,242.48	7,572.48
Net	₱ 20,387.52	₱ 18,057.52	₱ 15,727.52
OTHER ASSETS:			
Capital Investment - PNCB	₱ 700.00	₱ 700.00	₱ 700.00
Capital Investment FCWS	230.00	230.00	230.00
Capital Investment NCPH	8,500.13	8,500.13	8,500.13
Capital Investment CISP	2,000.00	2,000.00	2,000.00
Total	₱ 11,430.13	₱ 11,430.13	₱ 11,430.13
TOTAL ASSETS	₱388,943.49	₱374,022.23	₱410,138.31

LIABILITIES AND CAPITAL

CURRENT LIABILITIES:			
Patronage Refund Payable	₱ 1,458.99	₱ 1,525.54	₱ 2,864.83
Interest on Capital Payable	-	187.21	810.34
Customers' Deposit for Empty Bottles	1,220.66	1,470.66	1,470.66
Customers' Deposit for M-Gas	6,010.00	6,010.00	6,010.00
Commission Payable	8,499.29	11,242.33	1,242.33
Due to CETF	677.89	677.89	435.90
Accounts Payable - Trade	76,042.86	61,118.66	97,380.65
Loan Payable - Los Baños Rural Bank	-	25,000.00	5,000.00
Total Current Liabilities	₱ 93,909.69	₱107,232.29	₱115,214.71

FIXED LIABILITY:			
Capital Loan - GMF	₱ 41,513.36	₱ 41,513.36	₱ 41,513.36
RESERVED FUNDS:			
General Equity Reserve Fund	₱ 46,167.62	₱ 25,472.51	₱ 15,086.55
Education & Training Fund	16,527.89	22,690.22	29,377.91
Land & Building Reserve Fund	17,847.58	13,009.74	
Equalization Reserve Fund	12,051.84	8,619.75	
Audit Reserve Fund	5,633.85	5,633.85	5,633.85
Allocation for Improvement	25,091.30	4,837.84	
	₱123,320.08	₱ 80,263.91	₱ 50,098.31
MEMBERSHIP EQUITY:			
Authorized Capital Stock	₱200,000.00	₱200,000.00	₱200,000.00
Less: Unissued Capital Stock	136,400.00	127,400.00	82,265.00
	₱ 63,600.00	₱ 72,600.00	₱117,735.00
Less: Treasury Stocks	1,870.00	1,895.00	1,895.00
	₱ 61,730.00	₱ 70,705.00	₱115,840.00
Undivided Income	₱ 68,470.36	₱ 74,307.67	₱ 87,471.93
TOTAL LIABILITIES AND CAPITAL	₱388,943.49	₱374,022.23	₱410,138.31

FUNDOWALAH CONSUMERS COOPERATIVE
Comparative Income S atement
For the Year Ended December 31, 1979

	1977	1978	1979
SALES	1,823,130.68	1,831,074.93	2,056,797.78
Add: Goods Paid for Int. & Patronage Refund	₱ 52,976.85	₱ 50,953.03	₱ 52,065.29
Goods Paid for Bonus (Christmas Gift)	-	-	895.00
Total	₱ 52,976.85	₱ 50,953.03	₱ 52,960.29
TOTAL SALES	1,876,107.53	1,882,027.96	2,109,758.07
Less: Cost of Goods Sold:			
Merchandise Inventory, Beginning	₱ 200,345.80	₱ 200,615.85	₱ 226,848.82
Add: Purchases	₱1,718,236.31	₱1,682,095.92	₱1,914,171.80
Freight In	710.10	7.50	69.00
Total Purchases Freight In	₱1,718,946.41	₱1,682,103.42	₱1,914,240.80
Total Goods Available for Sale	₱1,919,292.21	₱1,882,719.27	₱2,141,089.62
Less: Merchandise Inventory End	256,681.38	226,848.82	279,520.07
COST OF GOODS SOLD	₱1,662,610.83	₱1,655,870.45	₱1,861,569.55
GROSS PROFIT	₱ 213,496.70	₱ 226,157.51	₱ 248,188.52
Less: Operating Expenses:			
Supplies	₱ 9,401.60	₱ 4,904.17	₱ 15,195.20
Miscellaneous Expenses	5,468.13	4,145.50	4,595.15
Travel	206.85	345.25	1,101.25
SSS Premium	2,213.20	2,627.10	3,294.00
Medicare	521.80	543.75	1,041.95
Employees Compensation	499.75	552.00	803.25
Salaries and Wages	92,104.58	93,586.02	119,637.77
Honorarium	7,785.00	8,100.00	9,900.00
Donation	595.00	599.25	134.70
Repair and Maintenance	5,085.45	1,881.64	1,703.80
Light and Water	6,458.10	6,689.49	5,333.88
Insurance	1,608.88	1,540.18	1,693.25
Telephone	712.50	991.76	954.61
Garbage Fee	1,000.00	1,400.00	1,100.00
Jeepney Supplies?Expenses	873.86	4,942.64	10,548.50
Living Allowance	10,900.00	13,350.00	11,600.00
Board Allowance	2,970.00	3,920.00	5,965.00
Audit Expense	300.00	-	500.00
Interest Expense	125.00	1,360.63	1,942.05
Bonus	5,265.00	6,085.00	895.00
Bank Charges	60.10	86.75	38.75
Depreciation Expense	7,171.67	6,952.17	3,662.00
Rent Expense	2,100.00	3,850.00	3,500.00
Commission Expense	-	-	720.74
Total Operating Expenses	₱ 163,426.47	₱ 168,453.30	₱205,860.85

Exhibit I-B (cont.d)

Total Operating Expenses (Brought Forward)	₱163,426.47	₱168,453.30	₱205,860.85
NET INCOME FROM OPERATION (Brought Forward)	₱ 50,070.23	₱ 57,704.21	₱ 42,327.67
Add: Other Inoome:			
Income from Printing and Developing	14,127.70	16,638.85	27,778.53
Transportation Income	7,007.10	4,552.00	-
Jeepney Income	-	-	50.00
Rent Income	440.00	860.00	275.00
Miscellaneous Income	302.15	250.65	212.14
M mbership Fee	110.00	45.00	55.00
Interest Income	16.88	-	81.89
Commission Income	-	-	16,691.70
Total Other Income	₱ 22,003.83	₱ 21,346.50	₱ 45,144.26
TOTAL INCOME before Managers' Commission	₱ 72,074.06	₱ 79,050.71	₱ 87,471.93
Less: Manager's Commission (5%, 6%, 6%)	3,603.70	4,743.04	5,248.82
NET INCOME FOR DISTRIBUTION	₱ 68,470.36	₱ 74,307.67	₱ 82,223.61

Distribution of Net Income

General Reserve Fund (10%)	₱ 6,847.03	₱ 7,430.77	₱ 8,222.36
Education and Training Fund (9%)	6,162.33	6,687.69	7,400.12
Interest on Capital (8.94%, 95%, 11.35%)	6,114.07	7,870.50	9,334.00
Patronage Refund (72%, 71.48%, 62.99%)	49,346.93	53,118.71	51,792.00
Land and Building Improvement Reserve Fund (6.66%)			5,474.49
	₱ 68,470.36	₱ 74,307.67	₱ 82,223.61

EXHIBIT II

FUNDOWALAH CONSUMERS COOPERATIVE
INCOME STATEMENT
For the Mid-Year Ended June 30, 1980

Sales		₱1,208,824.38
Add: Goods paid for Interest & Patronage Refund		30,603.88
TOTAL SALES		₱1,239,428.26
Less: Cost of Goods Sold:		
Merchandise Inventory Beginning	₱ 279,520.07	
Add: Purchases	1,128,618.55	
Total goods available for sale	1,408,138.58	
Less: Inventory at End	316,930.32	1,091,208.26
GROSS PROFIT		₱ 148,220.00
Less: Operating Expenses:		
Supplies	₱ 1,726.24	
Miscellaneous Expense	447.90	
Jeepney Expense	8,409.20	
Salaries & Wages	59,189.86	
Light & Water	1,673.82	
Garbage Fee	250.00	
Telephone	168.50	
Insurance	1,458.11	
SSS Premium	1,941.62	
Audit Fee	100.00	
Medicare	426.30	
EcC	356.40	
Honorarium	5,000.00	
Living allowance	5,940.00	
Repair and Maintenance	349.60	
Travel	711.80	
Board Allowance	2,420.00	
Donation	310.00	
Bank Charges	48.66	
Depreciation Expense	1,798.60	92,726.61
NET PROFIT FROM OPERATION		₱ 55,493.39
Add: Other Income		
Income from Printing & Developing	₱ 18,921.54	
Miscellaneous Income	17.65	
Membership Fee	85.00	
Commision Income	411.00	
Interest Income	388.50	19,823.69
NET INCOME FROM OPERATION		₱ 75,317.08
Less: 6% Manager's Commission		4,519.02
TOTAL NET INCOME		₱ 70,798.02
		xxxxxxxxxxxx

Prepared by:

(SGD.) Mr. C. M. KUNSENSIYA
Accountant

EXHIBIT III

FUNDOWALAH CONSUMERS COOPERATIVE
Balance Sheet
As of June 30, 1980

ASSETS

Current Assets

Cash in Bank	₱ 9,017.86	
Accounts Receivable	44,642.78	
Advances, Gen. Manager	19,700.57	
Prepaid Insurance	1,565.04	
Deposit for MT Bottles	1,940.88	
Deposit for M - Gas	4,259.50	
Deposit for Mobil Flame	350.00	
Printing & Developing	38,271.99	
Kitchen Utensils	208.00	
Supplies Inventory	9,113.95	
Merchandise Inventory End	316.930.32	₱446,000.89

Fixed Assets

Office Equipment Furniture & Fixture	₱ 39,817.22	
Less: Accumulated Depreciation	31,360.97	8,456.25
Delivery Equipment - Trackbayan	₱ 23,300.00	
Less: Accumulated Depreciation	8,737.48	14,562.52
Building Little Coop		44,000.00

Other Assets

Capital Investment - PNCB	₱ 700.00	
Capital Investment - FCWS	230.00	
Capital Investment - NCPH	8,500.13	
Capital Investment - CISP	2,000.00	11,430.13
TOTAL ASSETS		₱524,449.79
		xxxxxxxxxxx

LIABILITIES & CAPITAL

Current Liabilities

Patronage Refund Payable	₱ 18,348.51	
Interest on Capital Payable	3,433.62	
Customer's Deposit for MT Bottles	1,643.06	
Customer's Deposit M-Gas	6,010.00	
Commission Payable	6,490.65	
Due to CETF	435.90	
Account Payable - Trade	146,607.33	
Loan Payable Priests Individual	16,715.00	
Allocation for Souvenir Program	500.00	₱200,184.07

Fixed Liabilities

Capital Loan - GMP		41,513.36

Exhibit III (Cont'd.)

Reserved Funds		
General Equity Reserved Fund	₱ 23,308.91	
Education & Training Reserved Fund	36,778.03	
Audit Reserve Fund	5,633.85	
Land & Building Reserved Fund	5,474.49	₱ 71,195.28
Membership Equity		
Unauthorized Capital Stock	₱200,000.00	
Less: Unissued Capital Stock	61,865.00	
	₱138,135.00	
Less: Treasury Stock	1,895.00	136,240.00
Undivided Income		75,317.08
TOTAL LIABILITIES & CAPITAL		₱524,449.79
		xxxxxxxxxxx

Prepared by:

(SGD.) Mr. C. M. KUNSENSIYA
Accountant

The "Walang Katapat" District Credit Cooperative, Inc.

Group III

Team Leader : Jack R. Batoon

Team Member : Jo H. Lapitan

Lito Mayuga

Armi E. Peria

Supervisor : Dr. Rody M. Matienzo

The "Walang Katapat" District Credit Cooperative, Inc.

The "Walang Katapat" District Credit Cooperative, Inc. traces its roots as a mutual aid association exclusively among public elementary school teachers in the town of San Miguel. Through the years, its membership increased and subsequently converted to a credit union but not registered as a bonafide cooperative.

In October 1973, the coop was registered with the Bureau of Cooperatives Development as the "Walang Katapat" District Credit Cooperative, Inc. to become a community type cooperative. As a full-pledged cooperative, it expanded its membership to include market vendors, poultry and livestock raisers, tricyle drivers, tailors, fishermen and ordinary housewives who resides within the municipality of San Miguel. Today, it has a strong membership of 1,300, two-thirds of which are non-teachers. The coop generates a volume of business amounting to ₱2.3 M, the bulk of which comes from the non-teacher members. It was also in the same year that it constructed its own office building at a cost of ₱25,000 within the premises of the San Miguel Central School. The WKDCCI is now one of four community type credit cooperatives operating in San Miguel.

The WKDCCI presently has four full time personnel composed of the Treasurer, Mrs. D. Maligalig an elderly woman in the 70's and a retired teacher, a Senior Bookkeeper Mr. D. Maguiba in his 40's a polio victim and two assistant lady bookkeepers on their late 20's. The Coop's Board is composed of nine (9) members, seven (7) of them are current school principals with the district and two (2) are retired principals. The chairman Mrs. Masayahin is the incumbent District Supervisor, the highest school official in the district.

Despite the numerical strength of ordinary members, (non-teachers) it's surprising to note that a non-teacher has never been elected to the Board of Directors nor members of the various working committees. Apparently, attendance of ordinary members during annual meetings when elections are held is minimal.

Just like any credit cooperative, members delinquency of loan repayment worries the management. Three years ago, delinquency rate went as high as thirty five percent (35%). But when the new set of directors took over, the delinquency rate went down to twenty two percent (22%). The deputization of school principals by the district supervisor to act as loan collector seemed to have solved the problem of delinquency. Everything seems well in the cooperative except for a long time feud between Mrs. D. Maligalig and Mr. D. Maguiba who for the past four (4) years are not on speaking terms. Several attempts had been made by the Board to reconcile the two but to no avail. The members of the Board were themselves divided - some favored the "cold war" believing it will be for the good of the coop, since connivance between the two figures is avoided. On the other hand, other members of the Board including the two assistant Bookkeepers were of the opinion that it's doing more harm than good. The two assistant bookkeepers felt that they can be caught in between their tug of war.

This too was pointed out by Mr, M. Bagsik, the chairman of the Supervisory committee. He recalled working with Miss Buena, the other bookkeeper to put in proper order the cash receipts journal, accounts receivable ledger and other books of accounts including the Coop's Financial Statement in preparation for a forthcoming audit by the government's auditor. This happended when Mr. D. Maguiba purposely did not report to office for almost two months to show his indispensability.

Mr. M. Bagsik told the board that it's an illegal practice of the supervising committee to do such thing but had to save face. "This feud must certainly be settled!" He challenged the board.

Moreover, as the chairman keeps on with a mental review of the situation, other feedbacks flooded her memory. The two junior bookkeepers had often complained of their difficult situation in the office, i.e. Instructions from Mrs. D. Maligalig addressed to Mr. D. Maguiba passed thru them as channels: They never had any Treasury staff meeting since the feud started. Subsequently, there was no standard operating procedure being followed in the preparation of vouchers and other records. Reports and other communications prepared by Mr. D. Maguiba were forwarded directly to the Board of Directors without the proper endorsement by Mrs, D. Maligalig. In the same manner, Mrs. D. Maligalig prepare vouchers without the benefit of informing Mr. D. Maguiba. Checks issued by Mrs. D. Maligalig were often not indicated on the vouchers thereby creating difficulties in recording as well as in the preparation of bank reconcilliation by Mr. D. Maguiba.

The Chairman, Mrs. Masayahin shooked her head with disgust as she reviewed all these "gusty rains of frustrations and blame-shiftings" in her coop, afraid that if this goes on unsolved, the morale of the group against the management might bug down since both Mrs. D. Maligalig and Mr. D. Maguiba are indispensable in the Coop. The former, a respected mother of the ex-mayor of San Miguel with a huge savings in the Coop, while the latter, a brilliant young man noted for his efficiency and methodical manners are both assets of the cooperative. At one instance the two protagonists challenged each other to resign from their position but no one did.

Mr. Bagsik is oftenly heard by their officemates making such remarks as: "How can they hate each other so much when they are both cursillistas. Besides they often see each other in church."

If you are the Chairman of the WKDCCI will you:

- Recommend that one of the protagonists be fired. If yes, who should be?

- Fire both of them?

- Bring the case to the General Assembly for decision?

- Recommend a special investigation of the problem?

#####

fts/10/18/80

COOPERATIVE RURAL BANK OF PEÑAFRANCIA, INC.

Group IV

<u>Leader</u>:

Pat R. Estacio

<u>Members</u> :

Evelyn Dolencio

Yoly Guevarra

Ciony Nazareno

<u>Supervisor</u>:

Dr. S. C. Mehta

COOPERATIVE RURAL BANK OF PEÑAFRANCIA, INC.

Mr. Mario dela Cruz sighed as he put down on his desk the third loan application of a farmer (whose Samahang Nayon is one of the stockholders of the Peñafrancia Cooperative Rural Bank) he has turned down for the day, pulled his chair and sat down dejectedly. He couldn't help feeling defeated as he watched the farmer inched his way towards the door, looking lost and confused.

He pulled a folder from the top drawer of his desk and absent-mindedly started turning the pages of the annual statement of the bank's financial condition.

The Peñafrancia Cooperative Rural Bank (CRB) was organized on March 6, 1978, the first cooperative rural bank to be established in their region and the seventh in the whole country. It had an authorized capitalization of ₱5 Million, divided equally between common and preferred shareholders and started with a paid-up capital (common stocks) of ₱228,804.57.

The 2% interest-bearing preferred shares were a peso-to-peso counterpart capital assistance of the government, subscribed for by the Development Bank of the Philippines. The interest was conditional in that it was to be paid only if the CRB would make a profit.

The CRB was organized by 110 Samahang Nayon[1] (SN) and one credit cooperative state university operating in one of the towns within the region. Under the framework of the cooperatives development program of the Philippines, at least one CRB is to be established in each region to serve the financial needs of farmers, who, for years, had to rely on the private banking sector for financing their operations.

As conceived, all Grade A[2] SN in a region will pool their resources to put up a bank. Being member-owners, farmers will benefit both as borrowers and owner-lenders; as borrowers, they will be assured of capital when they need it, with a minimum of red tape and within a reasonable period of time; as owner-lenders, they will share in the bank's income in the form of interest to capital plus patronage refund.

Even during this year from January to September 30, 1980, they have earned a net income of ₱170,249.32, besides the earlier profits of the last two years. Mr. dela Cruz smiled as he visualized how pleased the members will be when he informs them of the planned declaration of interest to capital for the current year. Personally, he felt this was long overdue

---

1 Samahang Nayon is a farmers' pre-cooperative association organized at the village level. It is a non-stock association and registered with the Bureau of Cooperatives Development (BCOD). Within this association, members are taught cooperative principles and practices, SN mechanism and their responsibilities.

2 Grade A SN is an association whose members have completed the education and management training required by the BCOD and which has complied with the Barrio Savings Fund (BSF) and Barrio Guarantee Fund (BGF), the two savings programs of SN.

but their income for the past two years were not adequate (See EXHIBIT 1) to pay either the 10% maximum interest allowed by the BCOD nor the 14% maximum interest allowed by the Central Bank of the Philippines.[3] Certainly, he said to himself, he would like to recommend the granting of the maximum interest allowable by law.

Ironically, the SN stockholders are not complaining over the non-declaration of interest on their capital; instead some farmer members of these SN stockholders are grumbling over what they call the bank's "selectivity" in granting loans. Some complaints aired were that the bank was serving big independent farmers who were not SN members at all or farmers whose SN have not contributed any to the bank's capitalization. They felt therefore that in this respect, their CRB was a failure.

The next day, a very early caller at the bank was Mr. Amado Reyes, the chairman of the Martinez KSN.[4]

Extending his hand to his visitor, Mr. dela Cruz greeted him with a smile.

"Good morning Mads, it's nice of you to come."

"Good morning. I'm afraid you won't feel that way once I tell you why I'm here."

Patting Mr. Reyes on the shoulder, Mr. dela Cruz replied, still smiling: "Please sit down. OK I'm ready but I think I already have a hunch what brought you here."

"Mar, I hate to say this ... but aren't you being unfair?"

"To whom and for what? To your member because I turned down his loan application yesterday?"

"Yes. The guy had to travel all of 71 kilometers from our town to this place. And what about the work in his farm he had to forego just to attend to his application ... all for NOTHING!"

There was an unmistakeable sharp edge to his voice, which rendered Mr. dela Cruz speechless for some time.

"Mads, frankly I don't know how to explain it. You see, we have a board resolution to the effect that applicants should submit a clearance from their local rural bank certifying that they have no outstanding obligations. I think you'll understand ... I can't make an exception in your member's case..."

---

[3]A CRB has a unique personality in the sense that it falls under the dual supervisory jurisdiction of the CBP and the BCOD since it has to be registered with both government agencies as a bank and as a cooperative respectively.

[4]Katipunan (Federation) ng Samahang Nayon

"But we don't want a special treatment. All we're asking is some reasonable understanding on your part. My member whom you turned down comes from Cuyab, one of the biggest shareholders of this bank holding 17 shares, of which only 5.5% remains unpaid, repeat, only 5.5%. And what about other stockholders? Their unpaid subscriptions go as high as 43, 49, 57, 59%." (See EXHIBIT 2)

Again, Mr. dela Cruz could not speak. He knew his friend was absolutely right. Substantial amounts of individual SN subscriptions remained unpaid up to this day. Unconsciously, he shook his head.

"Mads, it's your understanding I need and what the Board also needs. As you know, the most critical period of any bank is the first three years of operation. This is your bank, as well as those of hundreds of farmers who have staked their meager resources to put into reality what was almost an unrealizable dream. If only for the satisfaction that I may contribute to your organizing, and more important, to your running a business enterprise that may remain viable for a long, long time, I, as manager, can not afford to fail. I suppose you can say that I have as much at stake in this bank as any one of you."

"What would happen if the Board, as well as I, would indiscriminately grant loans left and right? Our bank would not last this long. Actually, my 22 years with the Agricultural Credit Administration have taught me a thing or two in this loaning business, which I am now using to the bank's advantage."

This time it was Mr. Reyes' turn to be silenced. Mentally, he was going over the logic of his friend's explanations.

"Well, I suppose that's that. I just can't help feeling, though, that my member Samahang Nayon are a bit neglected. Minsan tuloy naniniwala na yata akong "mas malapit sa banga, mas malaki ang biyaya."[5]

This made both friends burst into a laughter of relief.

"Say, Mar, isn't it that the Central Bank grants rediscounting privilege to rural banks? Wouldn't that increase our resources? If it does, then that means we'll have more money to lend."

"I'm glad you brought that up. Yes, we do enjoy rediscounting privilege. It works this way: one kind of loan that we grant is called non-supervised credit, so called because the borrower puts up a collateral. Thus, there is no need for supervision on our part, to ascertain how such a loan will be used. This collateral is usually real estate. This real estate is what we submit to the Central Bank for rediscounting; the CB rediscounts 80% of the assessed value. However, the CB imposes a stringent condition on this; the moment our past due loans exceed 25% of the total, that privilege is automatically suspended.

---

[5]At times I would like to believe in the saying, "The nearer one is to the pot, the greater the blessings."

"Here, (handling a piece of paper to Mr. Reyes) you can see that the total amount of non-supervised loans for 1978, 1979 and up to September of this year has steadily increased, (See EXHIBIT 3) which means that the amount of money we can loan out is also increasing. However, I'd like to point out that we are also increasing our liability since this is a liability account that we have with the Central Bank. You can see, therefore, that this does not really add to our funds; also, you will see how important it is for us to maintain our good repayment record with the CB. I'm very happy to inform you that our CRB has a 100% repayment record."

"I see. I wish you could explain this to all members; I'm sure it will contribute much to correcting any misconceptions on the matter."

Mr. dela Cruz opened another drawer of his desk, pulled out a neatly typewritten sheet containing what looked like a list of amounts of money.

"I do Mads. Anywhere I'm invited to speak, I never fail to show this around." (He handed the piece of paper to Mr. Reyes). Please do me the favor of showing this to your members. It is a summary of operations of the bank from the start up to September 30 of the current year (See EXHIBIT 4). Actually we prepare such data monthly."

"I'll be glad to be of help. Well, Mar... (standing up) I think I may better be going. You know how far Martinez is."

After the usual amenities, the two friends parted, each of them glad to have had a dialogue to clear a rather ticklish issue.

Two days later, Mr. dela Cruz arrived at his office in high spirits. The night before, he had a chance to talk with the chairman of the KSN in his town, who promised to increase the share of his member SN's to at least 10 shares each. The reason advanced was very heartening - all the farmers were very pleased with, and very proud of, the way their "kababayan"[6] was managing the region's CRB.

From afar, he could see a piece of paper, conspicuously placed at the center of his desk, with the eye-catching wooden nude nameplate which friends and visitors invariably notice and comment on.

It was a letter from one of the Board members, Gaudencio Antonio, who was one of the more outspoken and dynamic chairmen of KSN's. The letter was brief, to the point and sounded urgent. (See EXHIBIT 5 for the original letter and EXHIBIT 6 for the English translation.)

Mr. dela Cruz was sure Mr. Antonio meant business. It was generally known that the latter, when he was sent to Malaysia to attend a seminar for farmers, impressed the participants from other countries with his extensive experience in farming and with his erudite views on how problems of farmers should be handled. He admired Mr. Antonio's dedication as municipal KSN chairman and he did not doubt

---

[6]townmate

at all the latter's concern for the welfare of his fellow farmers. Further, he believed that Mr. Antonio's suggestion might well be the solution to their problem.

"Excuse me sir," looking up Mr. dela Cruz saw the cashier. "Sir, I'd like to remind you of your meeting tomorrow at 10:00 - meeting of the Federation of Rural Banks, to be held at the Timog Rural Bank."

"Yes ... yes, thank you Helen. Oh, Helen, will you kindly give me the list of all BSF funds already with us? I'm particularly interested in individual SN accounts. Also, please get Mr. Samonte, the president of the Federation of Rural Banks, for me on the phone. I'd like to remind him about a proposal which I asked him to table fordiscussion for tomorrow's meeting."

Girding for the coming "battle", he started lining up his arguments against the obstinate resistance he anticipated from the rural bankers on the proposed transfer of BSF accounts.

"If," he was saying to himself, "the RB's contend that the transfer will impair their financial position, then we can counter that we are not proposing for an actual transfer. We will be contented with just transferring the fund to our account. Second, there is no legal impediment at all - even the CB is not interposing any objection to this move.

"If on the other hand, the reason of the RB's for their refusal is that farmer members of SN's are indebted to them, then we can propose to transfer only the account of those who have no outstanding obligations."

Smiling to himself, he mentally calculated how much their paid-up capital will increase. If only 20% or even just 10% of the total receivables can be collected, that will mean ₱81,060.93 or ₱40,980.46, respectively. He was sure the only obstacle to the SN's complying with their subscription pledges was the fact that their BSF are tied up to private rural banks. Time and again the KSN chairmen have assured him that the entire amount of their Barrio Savings Funds will be utilized for paying their remaining unpaid subscriptions as soon as these are released. Per CB regulation, a bank's loanable fund is 200% of its net worth for non-supervised credit and 400% for supervised credit.

"Sir, Mr. Samonte is on the phone."

*****

:nmb/cma-101880
a c c t

EXHIBIT I

Cooperative Rural Bank of Peñafrancia, Inc.

~~Cooperative~~ Comparative Statement of Income and Expenses
For FY 1978, 1979, 1980

INCOME	1978	1979	1980
erest Income			
Interest/Discount Earned			
Agrarian Reform Loans (Sch.)			
Agrarian Loan (excluding Agrarian Reform Credit	34,326.43	14,842.73	25,393.16[1]
Commercial Loans	1,388.60	5,895.87	5,916.99
Industrial Loans	---	109,127.37	241,480.57[2]
Other Loans & Discounts	321.77	13,583.11	15,681.38[3]
Interest-Mortgage Contracts Receivables			
Interest-Past Due Item/Items in Litigation	---	2,598.05	10,123.75
Interest-Investments	---	---	675.00
Interest-Taxable Investments	---	---	675.00
Interest-Bank Deposits	47,738.97	27,487.05	17,836.31
k Commission (Miscellaneous Income)	8,813.89	51,736.45	---
vice Charges/Fees	20,621.97	---	---
eign Exchange Profit (Loss)	---	---	40,085.84
idends-Equity Investment in Allied Undertakings/Affiliated			
er Income - Miscellaneous	3,825.00	3,440.82	2,683.69
Total Income	117,036.63	228,711.45	362,876.69
EXPENSES			
rest on Deposits	---	25,623.94	30,030.18
rest on Borrowed Funds	13,074.29	10,017.87[4]	19,961.04
npensation/Fringe Benefits			
Salaries and Wages & Staff Benefits	43,903.71	72,571.89	81,587.75
Directors' and Committee Members' Fees	3,560.00	9,395.00	9,745.10
SSS Medicare & Employees' Compensation Premium - Bank Share	1,946.05	3,447.80	3,259.50
Other Operating Expenses	49,409.76	85,414.69	94,592.25
agement and Other Professional Fees	---	3,200.00	---
ervision and Other Professional Fees			
s, Penalties and Other Charges			
es and Licenses	---	96.36	---
rance PDIC	91.81	23,073.02	249.21
eciation/Amortization	15,855.90	---	19,076.53
iation/Assets Acquired Expenses	---	31,693.28	28,718.16
r Expenses	21,212.27	---	---
antee Fee			
Debts Written Off			
isions (Miscellaneous Expenses)	1,873.25	---	---
otal Expenses	101,517.28	179,119.16	192,627.37
ET INCOME	15,519.35	49,592.29	170,249.32

ootnote:

1 Supervised Credit

2 Agricultural-Ordinary-1979,1980

3 Agricultural-Ordinary-1980

4 Rediscounting-1979

EXHIBIT 2

COOPERATIVE RURAL BANK OF PEÑAFRANCIA, INC.

Ratio of Subscriptions Receivable to Amount of Subscription for 10 Shares and Over by Individual Samahang Nayon

NAME OF SAMAHANG NAYON	NO. OF SHARE	SUBSCRIPTION Amount	Receivable	% of Receivable to Subscription
Martirez, Peñafrancia				
Cuyab	17	17,000.00	942.48	5.5%
Sta. Barbara, Peñafrancia				
Soro-Soro	15	15,000	6,196.82	41.3%
Loma	27	27,000	7,285.77	26.9%
Mamplasan	15	15,000	7,138.39	47.6%
Canlalay	24	24,000	11,647.71	48.5%
Zapote	16	16,000	7,015.31	43.8%
Langkura	26	26,000	4,894.71	18.8%
San Anton	16	16,000	7,016.42	43.9%
Timbao	12	12,000	4,705.57	39.2%
Bungahan	10	10,000	-	
Matulain, Peñafrancia				
Pook	11	11,000	5,384.51	49.0%
Balikat Dita	12	12,000	4,362.61	36.4%
Timog, Peñafrancia				
Marinig	30	30,000	13,154.41	43.8%
Muigan	10	10,000	-	-
Calamba	40	40,000	18,682.71	46.7%
Udisan	20	20,000	9,352.86	46.8%
Banlic	15	15,000	3,115.95	20.8%
Pansol	15	15,000	6,937.58	46.3%
Mayondon	22	22,000	10,566.90	48.0%
Dulag, Peñafrancia				
San Antonio	16	16,000	6,189.96	38.7%
Dila	54	54,000	16,168.33	30.0%
San Isidro	12	12,000	6,189.24	51.6%
Maitim	16	16,000	8,037.28	50.2%
Mauricio, Peñafrancia				
Lamot II	23	23,000	4,656.76	20.2%
Lalayhangin	16	16,000	6,753.81	42.2%
Masiit	33	33,000	14,923.78	45.2%
Mabacan	14	14,000	3,270.05	23.4%
Hanggan	15	15,000	8,100.60	54.0%
San Isidro	13	13,000	3,398.70	26.1%
Dayap	12	12,000	1,188.60	10.0%
Bulawin, Peñafrancia				
Pansol	20	20,000	9,026.34	45.1%

NAME OF SAMAHANG NAYON	NO. OF SHARE	SUBSCRIPTION Amount	Receivable	% of Receivable to Subscription
Rosario, Peñafrancia				
Manhaya	65	65,000	21,202.15	32.6%
Panca-Banca	22	22,000	10,835.29	49.3%
San Benito	22	22,000	4,093.41	18.6%
Masapang	30	30,000	13,600.51	45.3%
San Roque	40	40,000	18,915.42	47.3%
San Francisco	20	20,000	9,457.71	47.3%
Simbahan, Peñafrancia				
Sto. Angel Norte	21	21,000	-	-
Badang, Peñafrancia				
Manaol	11	11,000	5,388.18	49.0%
Sangkal, Peñafrancia				
Bagong Pag-asa	10	10,000	-	
Santa Ines City				
Santissimo Rosario	42	42,000	17,735.78	42.2%
Sto. Maria	11	11,000	-	-
San Isidro	27	27,000	16,073.92	40.5%
San Antonio II	15	15,000	10,926.08	29.1%
Sto. Angel	11	11,000	4,371.95	50.1%

EXHIBIT 3

COOPERATIVE RURAL BANK OF PEÑAFRANCIA, INC.
Schedule of Non-Supervised Credit by Type of Loans

Type of Loans	1978 Amount	1979 Amount	1980 Amount
Agricultural Loans			
A. Crops	₱523,717.95	₱ 877,650.00	₱1,812,761.60
B. Livestock	147,600.00	761,362.70	1,574,105.45
C. Other Agricultural Purposes	4,500.00	44,000.00	158,253.55
T O T A L	₱716,317.95	₱1,683,012.70	₱3,545,120.60

EXHIBIT 4

COOPERATIVE RURAL BANK OF PEÑAFRANCIA, INC.
RESULTS OF OPERATIONS FROM MARCH 16, 1978 to SEPTEMBER 30, 1980

I.	Total Resources		₱4,713,946.66
	Beginning (March 16, 1978)	₱ 628,804.57	
	Now September 30, 1980	4,713,946.66	
	Increase	4,090,142.09	
	Percentage of Increase	655.67%	
II.	Total Paid-Up Capital		1,459,165.33
	Common (Paid-Up by SNs)	829,165.33	
	Preferred (Invested by DBP)	630,000.00	
III.	Present Number of Membership		111
	CommonStockholder (SNs)	110	
	Preferred Stockholder (DBP)	1	
IV.	Loan Releases - Non-Supervised Credit		6,690,990.00
	Agricultural Loans	5,970,700.00	
	Commercial Loans	270,000.00	
	Other Loans & Discounts	450,290.00	
V.	Number of Borrowers Served		1,074
	Agricultural Loans	791	
	Commercial Loans	26	
	Other Loans & Discounts	257	
VI.	Loan Releases - Supervised Credit		1,027,563.47
	M-99	219,146.47	
	With Collateral	808,417.00	
VII.	Number of Borrowers Served....................		331
	M-99	183	
	With Collateral	148	
VIII.	D E P O S I T S		425,711.86
	Savings Deposit	373,911.86	
	Time Deposit	51,800.00	
IX.	Number of Depositors		1,206.00
	Savings Deposit	1,195	
	Time Deposit	11	
	Unearned Discount		199,816.06
X.	INCOME		
	Surplus, Reserve & Reserve for Contingencies..		20,861.97
	Undivided Profits (1979)		43,685.30
	Net Profits (Estimate) Jan. 1,1980-Sept.30,'80		169,259.32
XI.	Rediscounting Proceeds with the Central Bank of the Philippines..........................		3,963,000.00

EXHIBIT 5

September 2, 1980

Ginoong Mario dela Cruz,

Mangyaring sumulat ako upang imungkahi sa inyo bilang aming kinatawan sa Federation of Rural Banks na mapasama sa agenda ng susunod ninyong pulong, ang ating napagkasunduang hakbang ukol, sa mga nakadepositong BSF ng ating mga kasaping Samahang Nayon sa ibat ibang rural banks na kasapi rin ng Federation of Rural Banks.

Madalas ninyong sinasabi na kung kaya hindi mapagbigyan lahat ang umuutang ay sa dahilang maliit pa ang ating kapital na ang sanhi, ayon sa inyo, ay ang di pagbabayad sa takdang panahon ng mga subskripsyon ng mga Samahang Nayon. Ay papaano naman kaming makababayad ay hindi namin makuha ang aming mga BSF sa mga bangko rural. Kung natatandaan ninyo ay ito ang mahigpit na dahilan kung bakit ang lahat ng miyembro ng Board ay sumang-ayon na ang ating CRB ay sumapi sa Federation of Rural Banks.

Gaya ng ating napagkasunduan noong huling pulong ng ating Board of Directors ay hihilingin natin sa mga kinaukulang rural banks na isalin na sa pangalan ng ating CRB ang aming mga nakadepositong BSF sa kanila. Sa ganitong paraan lamang namin mababayaran ang aming natitirang shares of stocks na hindi pa bayad.

Ako, bilang pangulo ng kalipunan ng Samahang Nayon dito sa aming bayan at sampu na rin ng mga kasapi at pamunuan ng lahat ng Samahang Nayon dito sa Sto. Domingo, ay lubos na sumasang-ayon sa binabalak na hakbanging ito ng CRB. Unang-una, nalalaman namin na malaking tulong ito para sa aming mga kasapi dahil kung sakali at sang-ayunan ito ng mga rural bank ay lalaki ang aming mga kapital at kasabay nito ay lalaki rin ang aming tatanggaping dividendo buhat sa CRB. Kaugnay din nito ay makatutulong pa rin ito sa pagpalaki ng halaga na maaaring mautang ng CRB mula sa Central Bank na siya namang magiging pondo na maipauutang sa lalong maraming mga kasapi.

Inaasahan ko na bibigyan ninyo ng positibong aksyon ang bagay na ito.

Gumagalang,

GAUDENCIO ANTONIO

EXHIBIT 6

September 2, 1980

Dear Mr. Mario dela Cruz,

I am writing you in connection with our proposed plan concerning the BSF deposits of our member Samahang Nayon in different existing rural banks in the province. In your capacity as our official representative to the Federation of Rural Banks, I am suggesting that you make it a point to have this matter be included in the agenda for your next meeting.

You always tell us that the reason why not all borrowers can be accommodated is that we still have a very limited capital, and the cause according to you, is the failure of the member Samahang Nayon to pay its subscribed shares. But how can we pay when we are not allowed to withdraw from the rural banks. If you may recall, the main reason why all the members of the Board of the CRB agreed to join the Federation of Rural Banks, was the assistance we expect from them in this regard.

As agreed upon during the meeting of our Board of Directors, we must request the rural banks concerned to transfer our respective BSF deposits to the account of our Cooperative Rural Bank. Presently, this is the only possible way for us to pay in full all our remaining unpaid subscriptions.

All the officers and members of SNs in Sto. Domingo and I, in my capacity as President of Sto. Domingo KSN fully support this proposed plan of our CRB. Firstly, we know that if the rural banks approve the transfer of our BSF, our share capital will increase which means bigger dividends for us from the CRB. Moreover, such transfer will increase also the amount of credit the Central Bank could grant to the CRB for its loaning operations.

We are hoping for your favorable action regarding this matter.

Respectfully yours,

GAUDENCIO ANTONIO

(Revised)

TRAINING METHODOLOGY AND TECHNIQUES
FOR COOP TEACHERS IN THE PHILIPPINES

Case Study No. ________

THE HARDILAD AREA MARKETING COOPERATIVE, INC.

Submitted by Group V:

Emmanuel T. Cuaresma	Group Leader
Avelina M. Salcedo	Member
Felix L. Benito	"
Pastor N. Estioko, Sr.	"
Ernesto M. Boado	"

Dr. Dharm Vir - Supervisor

(Submitted as partial requirement for the course on Training Methodology and Techniques for Cooperative Teachers in the Philippines, ACCI, UPLB, Laguna, October 6-November 5,1980)

THE HARDILAD AREA MARKETING COOPERATIVE, INC.

INTRODUCTION

The Hardilad Area Marketing Cooperative, Inc. (HAMCI) in the province of Hardilad, after two and a half years of hectic and ambitious trading operations, had found itself in dire need of additional working capital. It consulted, therefore, the Ministry of Agriculture (MOA) for possible additional financial assistance. A team of MOA cooperative experts visited the HAMCI on October 13 to 16, 1980 to study and evaluate the Co-op's past and present operations, as well as its future development plans.

After Mr. Carlos de Leon, the Acting Manager, had enthusiastically briefed the team members on the HAMCI's history and operations and painstakingly explained its projected plans, open forum ensued. Later, the team members conducted interviews with some employees, board members, committeemen and members. They also went over the available records and observed the actual operations in the office and the mini-mart.

HISTORICAL BACKGROUND

The Hardilad AMC was organized on September 24, 1977 but was only registered with the government's Cooperatives Bureau on January 25, 1978 with an authorized capital of Two Million Pesos (₱2,000,000). The period between organization and registration was utilized in accumulating at least ₱100,000, the required minimum initial paid-up capital for registration. By the end of the period, the 71 original investor-Samahang Nayons (SN)* had accumulated paid-in shares amounting to ₱103,000 out of the ₱440,000 subscribed capital. However, before actual operations started in January, 1978, almost 50% of the initial paid-up capital was used up, of which more than ₱20,000 was spent in per diems and travelling allowances of Board Members.

The area of operation of the HAMCI is province-wide but only one-third of the province was effectively covered. Of the 330 Samahang Nayons, only 80 and one consumers cooperative affiliated with HAMCI as of June 30, 1980. Individual membership in the investor-SNs was 55% farmers and 45% non-farmers. As of the same date, the paid-up capital amounted to ₱120,000 but capital contributions of the original investors remained stagnant.

The HAMCI is presently occupying the basement of the Hardilad Cooperative Rural Bank (HCRB) building with a floor area of about 300 square meters, a stone-throw away from the Provincial Government Building. The cost of constructing said basement amounting to ₱36,028.06 was shouldered by the HAMCI. This was reflected in the HAMCI's books as Building Improvement account while HCRB treated the said amount as an accounts payable. There was, however, no written contract to this effect.

The first set of eleven Directors were elected in the organizational meeting in 1977. The Chairman and Vice-Chairman were members of the Board while the Secretary-Treasurer was not. Five members of the incumbent Board are first termers elected in the second general election held in April, 1980. Presently, the officers, including the Secretary and the Treasurer, are members of the Board.

---

* A Samahang Nayon is a village-based organization, primarily of farmers, from 25 to 200 members. It is operated under cooperative principles and is registered as a preparatory cooperative or pre-cooperative. It must undergo continuous membership education, regular savings, and disciplinary processes.

The first manager was a Management and Training Assistance Program (MTAP)* appointee. The incorporating Board of Directors, with reluctance, accepted him, but he was forced to resign after only eight months of operations. The second manager was an appointee of the government's Cooperative Bureau, who resigned when he was recalled to his government post 19 months after. The third and incumbent manager, who was the Co-op's former secretary-treasurer and retired public school official, is now working in an acting capacity. He is paid a modest monthly honorarium of ₱450 only. Two understudy managers were hired by MTAP in January, 1979 to assist the manager in business operations. Beginning January, 1980, the HAMCI assumed payment of their salaries. Due to financial difficulties, however, they were forced to resign in midyear 1980.

Previously, thirteen (13) employees were manning the HAMCI office, the mini-mart and the five trading posts. After the trading posts were closed, the number of employees was trimmed down to four, namely: the Acting Manager, the Accountant-Bookkeeper, the Salesman and the Janitor.

There were two elective committees: the Election Committee and the Audit and Inventory Committee. The Education and Training Committee was the only appointive committee. There were three members in each committee. None of the committees were functioning properly.

No training program for staff development was provided. The past managers and the incumbent manager, however, have been sent at one time or another for cooperative management training. Some members of the Board and the committees were likewise accorded the opportunities to attend cooperative seminars and workshops. No continuing membership education was undertaken.

BUSINESS OPERATIONS

The HAMCI procured and distributed agricultural inputs, such as: animal feeds, fertilizers and chemicals. It was granted dealership discounts by Planters' Product, the supplier of fertilizers and chemicals, but was later disqualified from the privilege of 6% rebates for failure to meet sales quotas. It marketed beef, pork and eggs to Metro Manila outlets, like consumers cooperatives, market vendors cooperatives, and private enterprises. The cooperative had also ventured into supplying the members and the general public with grocery items.

A. Trading Post Operations

To augment the business and service capabilities of the Society, the management with concurrence of the general membership, opened trading posts in five towns during the second quarter of 1978. A salesman, with a monthly salary of ₱350, handled the operations of a trading post. He was to administer a petty cash fund of ₱50.00 and was required to maintain records and books of accounts. Four posts were rented at ₱350.00 each and one at ₱400.00 a month. These trading posts carried animal feeds, grocery items, fertilizers, and chemicals. One post also sold eggs.

At the start of the trading posts' operations, purchase orders were directly made with the HAMCI central office. Weekly sales were reported to the accountant, and cash sales proceeds were turned over to the Treasurer. Later, the

---

* Under the cooperative law, a cooperative may avail of the assistance of the MTAP wherein a professional manager is hired by said MTAP to manage the cooperative to be assisted and to train one or two understudy managers. The manager's salary shall be paid by the MTAP and the co-op concerned under the following ratio respectively: first year, 100% to zero; second year, 75% to 25%; third year, 50% to 50%; fourth year, 25% to 75%; and fifth year, zero to 100%.

salesmen were allowed to use sales proceeds for purchases and cash advances/vales. Receivables increased and stock movements between posts without su- ing documents became frequent.

Sustained losses led to the closure of three trading posts in August, among and the other two in March and June, 1980. All available records, inventor in and other properties were turned over to the HAMCI central office. Records nter were found not up-dated and discrepancies were discovered. The discrepancies were charged to the salesmen's respective accounts.

B. Meat Business

In March 1978, arrangement was made with the Cooperative Marketing System of the Philippines (CMSP), an apex organization for marketing societies, to supply Super Palengke, a cooperative marketing outlet, with several hundred kilos of beef and pork.

The two MTAP understudy managers undertook the venture. They travelled throughout the greater area of the province, procured supplies from its members, processed and delivered the meat to Manila. Purchase orders increased, but members contacted could only supply 20% of it.

Travel and delivery expenses were provided by the Society for the operation. Reporting and remittances were done at the time of each delivery. Profits were relatively small but very steady.

During the greater part of 1979, the CMSP advanced ₱25,000 to the HAMCI to help finance the venture and the balance of sales paid a week after each delivery. At the later months of 1979, the HAMCI could not meet the purchase orders of the Super Palengke due to other commitments. The irregular and short deliveries forced the CMSP to stop the advances and subsequently led to the cancellation of the contract in December, 1979.

C. Egg Business

In November, 1978, Mr. Harold, FAO management consultant, arranged with Samahang Nayon Sales Center (SNSC), Metro Manila, for the HAMCI to deliver 90,000 eggs every week. An appropriation was set aside to finance the venture. One of the directors was made responsible for purchasing, transporting and marketing of the said commodity to SNSC. The initial volume delivered was 30,000 eggs per week and steadily built up to 50,000.

After about 8 deliveries valued at ₱65,000, only ₱20,000 was paid. To aggravate the situation, one delivery was rejected by the SNSC manager and was returned. After some heated negotiations for several days, the eggs ordered were accepted by SNSC. As though fate was disagreeable, the SNSC was suddenly abolished by its mother organization, the CMSP. The HAMCI finally abandoned its egg business in May, 1979.

D. Mini-Mart Operations

The Mini-Mart, located at the Central Office, started operations in January, 1978. It engaged in grocery items like canned foods, confectioneries, detergents, etc. It also maintained small quantities of agricultural chemicals and accepted bulk orders for animal feeds and fertilizers. The grocery supplies were procured directly from dealers and manufacturers in cash or short-term credit, usually for a week. No reserve stocks were stored for lack of available space.

A salesman with a monthly salary of ₱350 handled the operations. He kept records for sales and inventories. He remitted sales to the treasurer every three days and was subjected to regular quarterly audit and physical inventory by the accountant. Sales were transacted primarily on cash basis and only occasionally on short-term credit.

From 1978 to 1980 the Mini-Mart had built a good number of customers among government employees and nearby households. It is the only business left in operation. However, the recently established government-sponsored KADIWA Center, fifty meters away, is also engaged in consumer goods.

FINANCIAL OPERATIONS

The following items were selected from the financial statements to illuminate some facts about the financial condition/operations of the HAMCI:

ITEM	Dec. 31 1978	Dec. 31 1979	June 30 1980
Cash (On Hand and In Bank)	₱(no date)	15,200	29,200
Trade and other receivables	171,000	91,000	90,000
Receivables from CMSP	-	40,000	40,000
Receivables from SNSC	-	45,000	45,000
Inventories	60,300	39,000	48,500
	FY 1978	FY 1979	1980 (6 mos.)
Sales	1,131,500	2,769,000	163,600
Salaries and Wages	19,000	41,300	16,600
Net Profit (Los)	1,700	(187,300)	5,800

On the last day of their visit, the MOA team members held a conference with Mr. de Leon and some members of the Board of Directors. The parting words of the Team Leader were:

"Gentlemen, I want to be brutally frank with you. Your Cooperative is very sick. You have been running it on a "hit or miss" fashion. You made decisions withoout in-depth analysis of the problems or situations. However, your Co-op may be considered for rehabilitation if your Co-op's management can show its capabilities to cope with the situation. Always remember that a seemingly minor mistake in judgment at first sight may turn out to be a fatal management error in the end.

"We want you to make an "honest-to-goodness" analysis of your Co-op's problem or problems. Your analysis is an initial test of your managerial worthiness. From there we may then process your development plans and, maybe, recommend your Co-op for rehabilitation. May we have your in-depth analysis of the problem(s) soonest possible?

"Good luck and good day, Gentlemen."

After the departure of the MOA team, the Board members held a meeting to consider the issues. Some Board members were of the view that they ought to appoint not an honorary, but a full-time well-paid qualified and competent Manager from the market who alone could extricate the organization from this seemingly hopeless position. The Manager, Mr. de Leon, also put up before them a prospective Plan for the development of the Society which necessitated appointment of additional staff for the operations. One director was of the view that the Plan was very sketchy. Two directors were of the view that getting a loan would be easier, if a competent officer is taken on deputation from the MOA to act as a Manager. This would also generate more confidence in the financial agencies and customers and general public.

There was also a suggestion that since five directors of the AMC are also directors of CRB, they should exert their influence to persuade the CRB to finance the AMC on a regular basis. One director opined that CRB should be compelled by the government to finance the AMC inasmuch as a Cooperative Bank really exists mainly for cooperative development.

-#-

Appendix I

Excerpts from the articles of Incorporation of HAMCI

Objectives

1. To acquire, handle and market palay and its by-products, corn, vegetables, dairy, poultry, marine products and other products produced by its members or any of the products derived therefrom;

2. To engage in any activity in connection with the hauling, storing, processing, marketing, selling or utilization of any of the aforesaid products produced and delivered to it by its members;

3. To engage in the purchase and sale to its members of farm supplies, machinery and equipment, and/or any commodity needed by them;

4. To encourage diversified agriculture and improve rural community living;

5. To promote education in the principles, practices, and techniques of cooperation, production, and marketing;

6. To act as the agent or representative of the members in any cooperative activities; and

7. To provide other services for the benefit of its members.

###

Appendix 2

HARDILAD AREA MARKETING COOPERATIVE, INC.

Cooperative Statement of Financial Condition
As of December 1978, 1979 and June 30, 1980

ASSETS:	1978	1979	1980
Current Assets	₱ 399,400	₱ 167,900	₱ 176,300
Fixed Assets	4,500	47,400	44,800
Others	13,900	52,600	52,600
Total	₱ 417,800	₱ 267,900	₱ 273,700
LIABILITIES			
Current Liabilities	₱ 6,000	₱ 34,700	₱ 34,600
Fixed Liabilities	300,000	300,000	300,000
Total	₱ 306,000	₱ 334,700	₱334,600
NET WORTH			
Paid-up	₱111,000	₱ 120,000	₱ 120,000
Reserve	800	--	--
Net Profit/ Loss Retained	--	(186,700)	(180,900)
NETWORTH	₱111,800	₱(66,700)	₱(60,900)
TOTAL LIABILITIES & NETWORTH	₱417,800	₱ 267,900	₱ 273,700

###

/sml:10-18-80

Appendix 3

HARDILAD AMC, INC.
Comparative Profit & Loss Statement
For the year ending Dec. 31, 1978, 1979 & for 6 month ending
June 30, 1980

	1978	1979	1980 (6 mos.)
Net Sales	₱1,131,500.-	₱2,769,300.-	₱ 163,600.-
Less: Cost of Sales	1,066,000.-	2,790,500.-	123,200.-
Gross Margin	65,500.-	(21,200.-)	40,400.-
Less: Operating Expenses	70,400.-	143,900.-	35,000.-
Net Profit/loss from operation	₱ (4,900.-)	₱(165,100)	₱ 5,400.-
Add: Other Income	6,600.-	5,000.-	400.-
Net Profit/loss before other expenses	₱ 1,700.-	₱(160,100.)	₱ 5,800.-
Less: Other Expenses	-	27,200.	-
NET PROFIT/LOSS	₱ 1,700.-	₱(187,300)	₱ 5,800.-

TRAINING METHODOLOGY AND TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

CASE: Hardilad Area Marketing Cooperatives, Inc.

BACKGROUND NOTE FOR THE TEACHER
(for a Management Case)

A. Teaching Objectives:

1. To enable the participants to improve their skills in the use of the case study method in cooperative management.

2. To improve the participants' knowledge and skills in analyzing and evaluating information data presented in case studies and make recommendations for appropriate action.

3. To improve participants' potentials and skills in group discussions.

B. Target group

This case is specially designed for training management personnel.

C. Duration of the session

30 minutes for individual reading and analysis
30 minutes for group discussion
30 minutes for writing of group position paper
60 minutes for class presentation and discussion

D. Guides on problem identification, analysis of issues, exploration of the alternatives and choice of the best alternative/solutions

I. Problem

1. Defective business operation due to poor management

II. Causes

1. No proper feasibility study/implementation
2. Fast management turnover
3. Low salaries/honorarium
4. Overworked staff
5. Lack of qualified and dedicated manager
6. Lack of high caliber training for management Board of Directors and Committees
7. No continuing membership education
8. Lack of close government supervision

III. Effects

1. Lack of effective budgeting
2. Lack of members financial support
3. Ineffective in giving service to members
4. No marketing facilities (transportation/warehouse)
5. No proven feasibility studies/implementation

6. Incomplete and not up-dated books and records
7. Inactive ETC and AIC
8. Over expansion of business ventures
9. No effective inventory management
10. High sale in credit
11. Poor collection of A/R
12. Insufficient capital
13. Selling lower than cost
14. No staff development/membership education
15. Inefficient marketing intelligence service

IV. Alternatives

1. Continuous education for B/D, staff, committee and members
2. Hire competent manager from the province/good pay
3. Formulation of sound business policy
4. Systematic recording and updating
5. Drive for capital build-up
6. Campaign for collection of A/R
7. Conduct management training and audit

V. Potential Problems

1. May not be able to afford manager from province
2. Insufficient funds for training and education
3. B/D and Management may not have the skills and knowledge
4. Apathetic attitude of members
5. Insufficiency of funds to hire collection agent

VI. Recommendation

1. Hire qualified full time manager from the province
2. Conduct management training and audit
3. Conduct feasibility studies before engaging business
4. Conduct education of HAMCI members
5. Financial assistance from the government
6. Conduct capital build up
7. Reorganize the present B/D, committee to staff
8. More directors should be involved in business
9. More effort to collect receivables

E. Teaching Notes

The participants may be divided into groups of 4-6 persons each. Each group should elect a leader and secretary. Each participant should be given an outline solution for guidance in actual analysis. Group stand or position must be defended and explained explicitly in every item taken up. Ensuing discussions and disagreement from the individual participants must be guided by the teacher through the process of asking questions and injecting issues.

Sample of Solution Outline

A. Primary Concern/Problem

B. Causes

C. Effects

D. Alternatives

E. Potential Problems

F. Recommendations

*****

:nmb-110380

Group Objective: To introduce another method of teaching a case problem

Teaching Objectives:

1. To give the students an opportunity to go through a process of recognizing, analysing and solving a problem.
2. To develop the students' ability to view a problem from different perspective.
3. To make participants more open-minded to other people's points of view especially if these are opposing views.
4. To encourage maximum participation by members of the class.

<u>Case Analysis of Cooperative Rural Bank of Peñafrancia, Incorporated</u>

Problem: Selectivity in granting loans

Causes: Rigig policy on extending loans

Failure of borrowers to present the required clearance

Insufficient loanable funds

Alternative Course of Action:

Relaxation of the existing loaning policy
Limitation of loans granted to non-members
Acceptance of non-traditional collaterals

Alternative Course I - relaxation of the existing loaning policy

Advantages	Disadvantages
1. more farmer members can be served	1. high credit risk
2. a good way to show the CRB's sincerity and goodwill to serve as many members as possible	2. borrowers may resent the fact that they could not get the full amount they applied for.
3. if local RB's don't have a similar policy, farmer-members will shift their patronage to CRB	3. the CRB might not be able to maintain their present repayment record with the CBP.

Potential Problem/s	Contingent Action
1. the CRB will be assuming a higher credit risk	1. offer incentive in the form discount
2. it may not prove satisfactory to the members	2. continuing education

3. Encourage more member. SNs to open BSF and BGF accounts with the CRB.

4. Seek the legal opinion of the CBP and the BCOD re: whose regulation take precedence.

5. Encourage private individuals to open time and savings accounts.

# # #

/ldg
102480

For Session 19 - 20

GROUP DISCUSSION

Dr. S. C. Mehta
Professor

Meaning:

Group Discussion is one of the important participative techniques of teaching which has decidedly been found more effective than the conventional lecture method. It is an organized conversation in which members of a group actively participate and exchange ideas with a certain aim in view.

The members analyze an issue or a situation, raise objections, make suggestions subject the issue to a critical scrutiny and arrive at a consensual synthesis. Group Discussion is a democratic method of education in which the members learn through the interaction of each other's ideas, practice articulation of their views and generally make effective contribution to the solution of the particular problem.

It is a process of joint deliberation in which members are offered opportunities to appraise their viewpoints, absorb ideas of others and grow in understanding and ability in the process. They also shoulder responsibility for decisions taken and also for their implementation.

Number of participants:

The number of members in a group may vary according to the purpose, but to evoke fruitful discussion, the group should be small in which everyone could have his say. It forges a friendly and informal atmosphere in which acceptance of each other's viewpoints becomes easier. Hence, normally the number should be kept between five and fifteen.

Composition of the group:

A homogenous group would certainly help in mutual give and take, but stretched too far, it may lead to standardization and confirmity of ideas. For effective discussion and unravelling the different facts of a problem, it is desirable to have members with varying viewpoints. One member may possess a good memory for presenting facts; another, an analytical mind to help the group to scan those facts and still another, the ability to assimilate the different facts, to come to a rational solution.

But the diversity of interest and ability should not be so intense so as to cause dissension, due to ego or vanity. There should be a common desire to share, to contribute, to appreciate and to deliberate jointly through the process of cross-germination of ideas. A display of arrogance by any members would inhibit fruitful discussion, shutting off some and defying others to be comblative.

Discussion Leader:

The success of group discussion as a teaching technique depends considerably on the capacity of the discussion leader. He should be able to bring out, plan, organize, direct, control and coordinate the efforts of the members. He should ensure that the discussion is on the right track and is not lost in irrelevant bylanes, so that it steadfastly moves towards the right conclusion.

He should draw out those who are reserved and restrain those who seem to monopolize the discussions. He need not be a very knowledgeable person, but it would be necessary that he knows a little more than others of the subject, to enable him to enjoy the confidence and respect of the group, so that he could channelize the discussions in proper directions.

Duties of the leader:

(a) To plan the discussion: The topic of discussion, necessary study and reference materials, size and composition of the group, discussion room arrangement and use of other aids and equipments should be decided by him, quite in advance. A working paper, containing basic information on the subject of discussion should be distributed among the members,to stimulate fruitful discussion. The working paper may also present specific questions or issues on which decisions are called for. Group discussion may also be arranged on a situation, a case-study or even a lecture.

(b) To initiate the discussion:

The working paper should be read, problem should be presented in all its aspects and objective should be pinpointed, so that discussion may not digress from the main issues.

(c) To keep the discussion in process:

The leader should draw contribution from all members, provoke new ideas by injecting pertinent questions, summarize occasionally and direct flow of discussion towards rational decisions. The use ofchalkboard may be taken, where necessary.

(d) To conclude the discussion:

He should not allow the discussion to stray from the relevant aspects of the subject and guide it towards consensus, cutting off all unnecessary talks, gossips and gibes. If a time schedule is prescribed for the discussion, it should conclude in time. The discussion should be that of the group and not of the leader.

The following hints would assist the leader to achieve effective results:-

(i) Have a small group;
(ii) Choose a topic in which members are interested;
(iii) Have the sitting arrangement 'U' shaped or in a circle or in a square or rectangle, so that members may face each other;
(iv) Study the problem in advance and collect all relevant data and facts;
(v) Manage to keep the discussion on the right track;
(vi) Create an informal and relaxed climate;
(vii) Avoid offending anybody's sentiments;
(viii) Foster group feeling
(ix) Allow everyone to have his say. Draw out silent ones and do not allow vocal ones to monopolize the discussions. As in a football game, the ball should be continuously be passed on from one player to the other, driving it towards the goal post.

Advantages:

The group discussion method is highly useful in situations where the objective is to understand and absorb the information, exchange experiences, analyze facts, study specific problems, correct misconceptions, formulate attitudes, discuss policies and to decide on a particular action.

This method is decidely superior to lecture method in which generally, there is one-way traffic from the speaker to the audience and no feedback as to how far the latter have been able to assimilate the ideas propounded in the talk. The discussion technique is a self-learning process (through skillful direction of the leader) in which everyone contributes to arrive at a correct decision and to that extent, implementation of the decision becomes easier and effective. The group also develops its analytical skill in the process and also imbibes the attributes of tolerance and adjustments which are indispensable in any cooperative decision and action.

* * * * *

tav/10/6/80

The Two Million Rupees Contract That Got Away and the Foreign Travel That Never Was

Dr. A. S. P. Murphy, the extremely busy Research Director of Crop Institute, coming from a breakfast meeting with a foreign visitor comes in to his office at 8:00 a.m. to find his desk with a foot high pile of papers to sign, review, digest, file, follow-up, respond to in writing and act upon.

The first two papers had to be signed. They are requisition papers for a kilo of nails and 10 earthen pots for the greenhouse. The subsequent 25 papers were assortment of: a letter from his son from Harvard; a contract worth Rupees 2 million which is due for discussion at 8:30 a.m. that same morning; appointment of 10 staff members; three inquiries about a new variety of soybean produced by the Institute which was published in the national daily the previous week; two complaints from laborers (one about a minor spare part of a tractor that hasn't arrived up to now and another about a behavior of a co-laborer). Four are Christmas cards from previous classmates who are now occupying teaching and administrative positions in their respective countries. The last four papers consist of: (1) a memo from the Chairman of his Board asking him to prepare a feasibility study of acquiring an equipment which is quite expensive (the other alternative would be to rent the equipment from a nearby commercial laboratory, or send samples to the said laboratory on a job basis, both alternatives were used in the past but the experienced proved unsatisfactory due to delays, (2) a reminder for him to call the auditor about his cash advance of Rupees 1000 which has to be first liquidated before he can make another one for Rupees 5000 which he needs for his next trip, (3) an inquiry about what color to use in the painting of the comfort room in the greenhouse, and (4) a technical report about 500 pages long full of equations, footnotes, figures, graphs, and boring litany of tables.

In the meantime, it is already 9:00 a.m. and fifteen people are waiting outside his office. Five are job applicants, two close relatives, one department chairman needing quickly the Director's signature for his travel papers that has to be hand-carried by himself to the Ministry of Foreign Affairs at 9:30 a.m. that day to beat the deadline. Two are the same laborers who had sent him complaint letters earlier, three are from an agency which supplies the Institute with papers and ink. The last two are college students soliciting donations for the staging of a school play to raise funds for charity.

As he was going about the papers, he was interrupted five times by phone calls. One from a newspaper columnist verifying story attributed to one of his department heads (this took 10 minutes to put away). Two from department heads asking about his action on their request for experimental lot allocations for the two departments which they sent-in last month yet. One from his wife reminding him to come home early so they will have time to drive to a friend for dinner about 20 miles away. The last call was from the warehouse man asking him what to do with a gas leak that he has just noticed.

That was one of the bad days for our Director. He failed to act on the Rupees 2 million contract before the 8:30 deadline which resulted in losing the contract to another research institution. His one of the

Departmental Head who was to attend an important scientific meeting in Japan was not able to catch up with the deadline for his travel papers: consequently, the Head of the Department had to cable regrets to the organizers.

Task of the Group

What can you say about the system of the Director. What is the problem with him? How could he have prevented the two disasters from happening that day? If you were to advice him on how he can improve the system to prevent repetition of the same disaster, what would you recommend?

# # #

ldg/
October 20, 1980

TRAINING METHODOLOGY AND TECHNIQUES FOR COOPERATIVE TEACHERS IN THE PHILIPPINES

Session 20

BACKGROUND NOTE FOR THE TEACHER
(for a Management Case)

Contents

1. Teaching Objectives
2. Target Group
3. Duration of the Session
4. Identification of Problem(s)
5. Analysis of issues, exploration of the alternatives available and choice of the best alternative/solution.
6. Solution adopted by the Management of the Cooperative, if any.
7. Suggestions for conduct of discussions in respect of the case.

###

Observation Sheet

(To be given only to observers)

The following items are furnished as a guide for observing what the leader (President) did and how others reacted.

1. How did the leader present the problem?

   a. In presenting the problem did the leader have the attitude of asking for help?

   b. Did the leader present all the facts?

   c. Was the leader's presentation of the problem brief and to the point?

   d. Did the leader scrupulously avoid suggesting a solution?

2. What things occurred in the discussion?

   a. Did all group member participate?

   b. Was there free exchange of feelings between group members?

   c. Did the group use social pressure to influence any of its members?

   d. On which member of the team was social pressure used?

   e. Was the leader permissive?

   f. Did the leader avoid taking sides or favouring any person?

   g. What were the points of disagreement in the group?

3. What did the leader do to help problem solving?

   a. Did the leader ask questions to help the group explore ideas?

   b. Were all ideas accepted equally by the leader?

   c. Did the leader avoid hurrying the group to develop a solution?

   d. Did the leader avoid favouring any solution?

   e. Who supplied the final solution?

   f. What did the leader do, if anything, to get unanimous agreement on the final solution?

ROLE-PLAY - A TEACHING TECHNIQUE

1. What is Role-Play?

Role-Play is a teaching technique which helps Cooperative officers, auditors, managers, supervisors, members and board members to sharpen their knowledge, skills and attitudes, not by talking about the problem, but actually doing something about it, in the simulated climate of training. It emphasizes practising and doing; action and experimentation. In essence, it is a "Human interaction that involves realistic behaviour in simulated situation".

Role-Play is a portrayal of a situation, where the emphasis is on the relationships amongst individuals performing various functions in a Cooperative Society. Thus, it centers around human interaction and human communication amongst members of the Cooperative Society. The participant-group is informed of the situation and they are assigned the different roles they have to play. On the basis of the situation, the Role-Players are expected to act in the presence of the other members of the group. The learners are given the opportunity to discuss and analyze the performance. Based on the specific objective or objectives of the Role-Play, learners examine how effectively the Role-Players have performed their task. They also can examine how the Role-Players' performance could have been improved. For example, the Role-Play may portray a situation where the group members actually enact the roles of the Board of Directors in the meeting of the Cooperative Society; or the Role-Play may be a problem solving exercise where the Role-Players are expected to involve themselves in a full discussions; or the Role-Play may be a situation where a manager of a Cooperative Society in handling the complaint lodged by a customer or where a Personnel Manager of a Co-operative Society is inquiring into a grievance of an old employee.

2. Objective of Using Role-Play

The objective of using Role-Play as a teaching technique is to deviate from the traditional lecture method presently followed in many cooperative training situations, and introduce a participative technique of teaching, where the learners themselves are involved. The monotony in a class is broken as it arouses the interest of the trainees. It creates an effective teaching situation, facilitating sharpening of knowledge, skills and attitudes of the cooperative trainees, so as to enable them to perform their duties more effectively and efficiently.

It has been increasingly used:

* to teach principles of management
** to improve skills in inter-personal relationship
*** to modify attitudes and change behaviour

3. Why Use Role-Play?

The questions that naturally arise in the mind are:

* "Why the Role-Play has been used so much as a teaching technique?"
** "How does it help a trainer?"
*** "When does it help a trainer?"

The answers are to be found in 2 areas:

A. The changed definition of training and

B. Nature of the group that a trainer is dealing with in the cooperative training.

3. A. The changed definition of training

The prime objective of cooperative training is not different from that of any other training. It is to bring about "relatively lasting modification of behaviour, resulting from changes in the knowledge, skills and attitudes of the participants".

The traditional notion that education and training consists of one person transmitting knowledge to another has been dispelled due to modern researches on Psychology of Learning and Psychology of Training. All researchers say that learning is really an internal process.

Training is considered to be successful only when learning takes place in the participant; and there is visible change in the behaviour of the participant. It is a complex process that takes place wholly in the learner, and involves his intellect, his feelings, his values, his attitudes and skills.

Thus, all training or education is really a self-education. A trainer cannot really teach but he can only help a learner to learn. The art of teaching has accordingly shifted from lecturing, lesson planning and testing the person towards involving the learner in planning, conducting, diagnosis and evaluating his own learning. In other words, the highest art of trainer is the art of ego involvement.

This is more so when the trainer's objective is development of appropriate attitudes and sharpening of inter- personal competence and communication skills. Knowledge and information can be transmitted from one head to another, wherein appeal to mind and intellect are sufficient enough. But in skills and attitudes training, the whole person needs to be involved, his heart is to be tuned and his ego has to be strengthened.

Role-Play helps the trainer to refine this art of ego involvement. This happens because in the Role-Play, the participants plan out their strategies in the problem situation and analyze the results achieved as well as their own learning. The teacher, through Role-Play draws on the experiences of cooperative learners and encourage the learning process by relating the experiences of learners to new information or insights.

B. The Nature of Cooperative Learner:

Cooperative training in most situations today, takes the form of one-way communication by the teacher and the learner is expected to listen patiently. The learner often complains that cooperative training programmes are too theoretical leading to boredom. The cooperative teacher, in turns, feels frustrated that the learners do not appreciate his efforts.

Therefore, a question that is perplexing many cooperative trainers of today is, "Why can't we train the way we were being taught in the school?" or "Why the participants do not accept what we teach them?"

The answer lies in understanding the characteristics of the group, which is a cooperative trainer deals with. The cooperative trainer, does not teach a child any more. He deals with the adult group. The characteristics of the adult group are quite different from those of children.

B(i). An adult in contrast to a child tends to see himself as a responsible, self-directing person. In fact, the psychological definition of adulthood is the time when an individual becomes self responsible and self directing. For this reason, an adult has a deep psychological need to be trained with respect, to be perceived as having the ability to run his own life. He tends to avoid and resent being placed in the situation in which he feels he is treated like a child, told what to do and what not to do, as well as talked down upon. Therefore, he resents lecturing which is in essence, advising. Role-Play gives him a sense of self-direction and self-responsibility for learning, and therefore, makes training acceptable to an adult participant.

B(ii). An adult enters the training class with a different background than that of a youth. Having lived longer, he has accumulated a greater volume of experience. Because of the past experiences, an adult may have more of fixed habits, frozen thoughts and unconscious attitudes.

He has successes as well as failures in life. He has his own self-concept, his own self-image. Experience is no doubt the best teacher, but not always the right teacher and therefore, lot of skills and attitudes need to be unfrozen before he can incorporate new but appropriate attitudes and skills. Role-Play again helps here, because he acquires new data and new experience through acting and doing experiments in the classroom. He does not have to be told by the teacher because he starts analyzing his new experience, and in the process, acquires new skills and attitudes without threatening his own self-concept.

B(iii). An adult is not interested in the academic discussion in the class, he is not interested in theory and principles. He is bothered by his problems and he wants solutions for them. During Role-Play, when he practices the principles and concretises the theory, he gets the first hand demonstration of usefulness of new concepts in solving his practical problems.

Cooperative learners have all the three characteristics mentioned above. The cooperative learner possesses an outstanding experience of both success and failure behind him. He is no more a student who is prepared to listen to the teacher all the time.

He needs recognition and wishes to learn by bringing his own experience and ideas. He does not expect any academic training and is least interested in theory and principles. His work situation is such that he is daily confronted with problems for which he expects solutions. Therefore, he can be motivated to learn in a healthy atmosphere created through Role-Play where his experience can be drawn for him to find solutions by himself.

4. Areas of Usefulness for Role-Play:

In the light of the above conditions, the following could be indicated as areas in which Role-Play would be used as an effective teaching technique in the field of cooperative movement. The list is only indicative but not exhaustive. The teacher can think of many more suitable topics, sub-topics and areas which could be effectively covered by using Role-Play technique.

* Cooperative Education and Training:

- Cooperative member education
- Teaching of cooperative principles
- Extension education
- Leadership development in Cooperative Societies
- Training cooperative teachers
- Developing salesmanship skills
- Sharpening group discussion skills

** Cooperative Management and Development:

- Taking decision on important policy matters in a Cooperative Society
- Clarifying role and functions of different functionaries in a Cooperative Society
- Conducting various kinds of meetings in a Cooperative Society
- Relationship between primary cooperatives and their federations
- Presenting problems of a Cooperative Society before different authorities.
- Discussing audit report with the government auditors
- Planning for cooperative development

*** Inter-personal Relationship:

- Senior-junior relationship
- Solving differences of opinion
- Evaluation of performance and counselling interview
- Motivating the subordinate
- Giving job instructions
- Conducting legal inquiries
- Selection of employees
- Negotiating with the trace union

A WORD OF CAUTION:

It is to be emphasized that there are many other participative training techniques available for a cooperative teacher. They are Case-study, In-basket exercises, Programmed Instruction, etc. Hence, Role-Play is to be used only in topics, where it has edge over the other participative techniques. It thus, does not replace other participative training techniques, but is just one more tool in the hands of cooperative teachers. Further, for certain subjects, lecture also have their usefulness.

A teacher, thus has to judiciously choose the different training techniques depending on the time available with him and the topics he is dealing. In fact, the more training techniques he uses, the more interesting his teaching will be to the participants as well as to him. Over-reliance on any technique brings in monotony and dullness.

****
**

:nmb / 100780

Training Methodology and Techniques for Cooperative Teachers in the Philippines

International Cooperative Alliance

Regional Office & Education Centre

for South-East Asia

"Bonow House" 43, Friends Colony

New Delhi - 110065 (India)

LEADING A COOPERATIVE

(GROUP ROLE PLAY)

- by Dharm Vir, Ph.D
ICA ROEC, New Delhi

PART - I

Teachers Notes on Role Play
(not to be distributed among students)

1. Objectives: A. To introduce role play and demonstrate the group role play technique.

   B. To give participants some experience in role playing and conducting managing committee meetings.

   C. To discuss the use of role playing in management training and cooperative education.

2. Target Population: Teachers under training from Cooperative Training Institutions.

3. Group Size: 10 - 15

4. Material Needed: (For conducting Role Play)
   i) Name Cards for role players)
   ii) Role play briefs,
   iii) Observation Sheets
   iv) Description of general situation.

Handout Material: (to be given to all participants at the time of summing up as reference materials)

(a) Chapter on Role Play from Participative Teaching Methods published by CEMAS, ICA, London.

i) Voluntary Work in a Cooperative (Annexed-A)

(Group Role-Play Exercises)

ii) Selling Cooperation (Individual Role Play by Prof. S. Khandwala & Dr. D. Vir)

Background Material: (Participants to obtain and read)

(a) "Role Playing" - pp I to 18 of chapter

14 from An Introductory Course and Training

Methods for Management Development, by I. L. O.

(b) Manual for Study Circle Leaders, by Dr. D. Vir, ICA ROEC, New Delhi

Further Readings: (Participants to obtain and read)

(a) ILO Management Development Manual A Chapter on "Human Relations, Case Studies and Role Playing"

(b) Craig and Bittal: <u>Training and Development</u>

<u>Handbook</u> Chapter II, "Role Playing" by Malcom E. Shaw

5. <u>Participants to Play Role:</u>

1. President (Mr. Thomas)
2. Vice-President (Mr. Abdullah)
3. Secretary (Mr. Pramun)
4. Treasurer (Miss Murthy)
5. One Committee Member (Mr. Singh) (two committee members are absent)

6. <u>Classroom arrangement:</u>

1. Some furniture in a room, five chairs around a table for role players, Other participants will face the role players at some distance, but should be able to hear the role players.

7. <u>Application in the Class:</u>

(I) Introduce role play and mention that in a role play exercise the participants are asked to imagine that they are participating in a <u>real life situation</u> and to work out their responses. It is quite different from demonstration of a dramatic play in which the actors show something to the audience, they already know. Also mention that a role play is not a game but can be fun. There can be various types of role play, viz. <u>groups</u> role plays and individual role-plays. Both types can be used as effective training technique in some management situations. In group role plays there are <u>more than two</u> role players and in individual role plays ther are <u>only two.</u>

(2) The main purpose of role playing is to let the participants understand, experience and appreciate the thinking and feelings of others whose role they are taking and playing. It will help them in objectively perceiving in improving inter-personal relationship.

(3) Give general instructions to all the role players that they should accept facts as given and assume the <u>attitude</u> implied in their roles. When facts and events occur that are not covered by their respective role, the role players should make up things that are consistent with the way it might be. The feeling and the mode of behaviour should be in accordance with events that transpire in the role playing process. After the role is over, they <u>should not</u> continue to feel offended, if their feelings have been hurt during the process.

(4) Give the general description of the situation. Select five participants for playing different roles, on a voluntary basis.

(5) Fifteen minutes before the role play demonstration give each participant his respective role play brief and ask him to read it alone.

(6) The role players should be sent out of the class room with the instructions that they do not talk to each other. If necessary, each role players is briefed about his role individually.

(7) Give the rest of the trainees copies of Observation Sheet (Annex-E) and ask them to observe the behaviour of role players during the process of the role.

(8) The process of role playing may continue for about 15 minutes. To make role playing effective the instructor can use devices, such as doubling, role repetition, role reversal, etc.

(9) Stop the role play before the problem situation is resolved, Soon after the role play is over ask each player about the way they felt during the role play. Whatever, they feel any change in their attitudes.

(10) Then ask the observers to give their observations according to their assignments. They should use the given names and not the actual names of role players.

(11) After the experts have given their opindons the role players may be given an opportunity to give their impressions as to what transpired during the role play.

8. Time Allocation: 90 minutes (30 minutes for role playing and 60 minutes for discussions and summing up).

Annexe-A

PART-II

Description of General Situation

1. There is a Cooperative Cooperative College being run by the National Cooperative Union of an Asian country. The employees of the College have formed a Thrift and Loans Society. There are 36 members of the Society who regularly contribute equal to five percent of their salaries as compulsory deposits. The office bearers (who are honorary workers) are elected every year. The Committee of Management consists of 7 members. Besides two absentee committee members, the following are active office bearers for the current year:

1.	President	(Mr. Thomas)
2.	Vice-President	(Mr. Fernando)
3.	Secretary	(Mr. Pramun)
4.	Treasurer	(Miss Adela)
5.	Committee Member	(Mr. Juan)

The President has received several complaints from the members against the behaviour of the Secretary and the Treasurer who are paid a modest honorarium for third week.

2. The main complaint against the Secretary is that he is not entertaining the loan applications in a systematice manner and the complaint against the Treasurer is that she is not immediately issuing receipts for the deposits and other payments received from the members.

3. The President called the Secretary and the Treasurer and discussed with them the complaints from the members against them. The Secretary and the Treasurer blamed each other for the mis-management and said they had no time to devote to this work and were prepared to resign.

4. To solve the internal problems and to discuss mamebers' complaints the President calls the meeting of Managing Committee in which all the office-bearers and one Managing Committee member participate. Two managing Committee members are as usual absent.

(For distribution among respective role players)

1. The Role Play Brief for President (Mr. Thomas): You are active and educated cooperator with a desire to serve the members and also to motivate others for cooperative work. Being the Vice-Principal of the College, you do not have enough time to look into the routine management of the Society and into the complaints of individual members. Moveover, you are usually out of station on official work. You try to persuade the Secretary and the Treasurer to do their work properly and appeal to others to assist them in the discharging of their heavy duties. You, however, fail to understand the difficulties of your colleagues in the cooperatives and expect them to be as enthusiastic as you, in work of the cooperative. Often you refer to cooperative philosophy and principles.

2. Role Play Brief for Vice-President (Mr. Fernando): You work as a Personal Assistant to the Principal of the College and are not interested in working in the cooperation. You are elected as Vice-President with the hope that you will get interested in the Cooperative, in due course, but your heavy official duties keep you away from the routine management of the Cooperative.

3. Role for Secretary (Mr. Pramun): You are an accounts clerk in the office of the College and have a short **temperament.** You had worked as Treasurer during the last year. You have a big family to support and have therefore to increase your income. You have been trying to improve your qualifications through a parttime course in accountancy. You want that more honorarium should be paid to you, as besides your duties as a Secretary, you claim to help the Treasurer in maintaining the accounts of the Cooperative. You do not like to hear criticism from any body for the voluntary work done by you, as the cooperative. Your main complaint is that the Treasurer does not know how to maintain accounts, nor she tries to learn from you. Above all she is of non-cooperative type.

4. Role Play Brief for Treasurer (Miss Adela): You are a new person in the Cooperative. You do not know, how to maintain account of the Cooperative. However, on receiving assurance for assistance from Mr. Pramun (Secretary) you had agreed to work as a Treasurer. Your office duties do not allow you to devote much time to do the cooperative work. You were given an opportunity to attend a training course organised by the local District Cooperative Union. But you did not avail of the opportunity because of your other pre-occupations and lack of interest. Your main complaint is that no body helps you in maintaining accounts not even the Secretary who had assured you, earlier, of all the assistance. You also feel that the honorarium give to you by the cooperative is meager. Morever, you demand some facilities from Training College, so that you can do the

5. Role Play for Managing Committee Member (Mr. Juan): You work as a messenger boy in the College and were elected as a managing committee member of the Cooperative. You are young man, full of enthusiasm and energy for the Cooperative. In spite of your heavy duties in the college, you attend to the work of the Cooperative, as assigned to you. You also try to attend meetings of the Managing Committee regularly. Your main complaint is that other office bearers are not fully duty-conscious. Specially, the Secretary is not guiding the members properly and he is often showing partiality in processing loan applications.

Annexe-B

Observation Sheet

(To be given only to observers)

The following items are furnished as a guide for observing what the leader (President) did and how others reacted.

1. How did the leader present the problem?

   a. In presenting the problem did the leader have the attitude of asking for help?

   b. Did the leader present all the facts?

   c. Was the leader's presentation of the problem brief and to the point?

   d. Did the leader scrupulously avoid suggesting a solution?

2. What things occured in the discussion?

   a. Did all group member participate?

   b. Was there free exchange of feelings between group members?

   c. Did the group use social pressure to influence any of its members?

   d. On which member of the team was social pressure used?

   e. Was the leader permissive?

   f. Did the leader avoid taking sides or favouring any person?

   g. What were the points of disagreement in the group?

3. What did the leader do to help problem solving?

   a. Did the leader ask questions to hold the group explore ideas?

   b. Were all ideas accepted equally by the leader?

   c. Did the leader avoid hurrying the group to develop a solution?

   d. Did the leader avoid favouring any solution?

   e. Who supplied the final solution?

   f. What did the leader do, if any thing, to get unanimous agreement on the final solution?

PART III

For Teacher's Use Only

Conclusion: (not to be distributed among participants)

1. Emphasise that Role Playing is not a game but can be fun. It is a useful training technique which if well conducted has great learning potential for teaching emphathy or the ability to appreciate and understand emotions of other persons. The situation depicted in role play exercise should be closely related to work experience and needs of the participants. (Objective A)
2. The Role Play is most effective when used for changing attitudes and thus for improving inter-personal relations in management situations. (objective C)
3. Mention that the role play has different forms, viz, of group role play, individual role play and role play with or without observers. (Objective B)
4. Point out the value of devices such as, doubling, role repetition, role reversal in making role playing more effective. (Objective A)
5. Distribute copies of the whole role play exercise (Annexe A and B) and other handouts among all the trainees. Discuss the limitation and importance of role play in improving human relations. (Objective A & C)
6. Suggest some further readings on the subject.

###

SESSION 45 - 46

NATIONAL COURSE IN TRAINING METHODOLOGY

6th Oct. - 5th Nov. 1980

SIMPLE TECHNIQUES OF GROUP DEVELOPMENT

by

Dr. Dharm Vir

Jointly organised by

INTERNATIONAL COOPERATIVE ALLIANCE
Regional Office & Education Centre
for South-East Asia
"Bonow House" 43, Friends Colony,
NEW DELHI - 110 005

ACCI/BCOD
Philippines

SIMPLE TECHNIQUES

OF GROUP DEVELOPMENT

Definition of a Group

According to psychologists a group may be defined as a social unit possessing the following basic characteristics:-

(a) It consists of two or more people
(b) there is interaction and communication between the members;
(c) there are one or more symbolic objects present; e.g. the objects and principles of cooperation; the motto of "all for each & each for all"
(d) each person has some kind of relation with other members and one or more symbolic objects; e.g. in the executive of a club or association, and
(e) they have unit awareness, viz. among the board members of a well run cooperative society.

Why Groups Fail ?

Most failures in groups are due to one or more of the following reasons:

(1) The atmosphere inhibits group action, e.g. in a teacher oriented class.
(2) The group is not composed of the right combination of persons. Their objects and interests differ too much.
(3) The members lack skills in playing their respective roles.
(4) The organization is not suitable for accomplishing desired purpose. For example, cooperatives being mainly business organisations are less suitable for political or charitable purposes.

Diagnosis of a Group

Sociability of individual members and social climate of a group can be measured with the help of psychological tests and sociometric techniques. For example, the teacher of a class may ask his students to name three most popular classmates in order of their preference. He may ask each individual students to note down these names on a slip of plain paper and hand it over to him. The students may write confidentially three names in order of popularity and they need not put their own names on the slips to avoid identification and consequent unpleasantness. These slips duly completed should immediately be collected by the teacher in the class itself. The results of data collected from students may be analysed and if necessary results announced in the class. Use of technique will arouse much interest in the class and will lead to improvement in the social perception on students.

There are other techniques in which some social indicators are listed to show characteristics of democratic leaders or Integrative Vs. Disintegrative tendencies in a group. The indicators written on separate cards are mixed up at random and then the students are asked to classify them according to given instructions. Such games have been found highly interesting and useful for group work in the class. The specialists in business management use several types of "business games" in their training programmes and involve their students in the educational process.

Objectives of Group Development

Some of the objectives which can be achieved through group development techniques are as follows:-

(1) To make the members of a group interact and participate in an educational activity.
(2) To make the members understand that each of them can be more effective when they belong to a group.
(3) To develop in them ability to express their ideas and communicate effectively in a small or large group.
(4) To develop interest in group work, and social outlook.
(5) To develop democratic values and social attitudes among members and thus promote cooperative leadership.
(6) To develop ability to think quickly, clearly and critically.

Techniques of Group Development

Some of the important techniques of group development are discussed briefly in the following account. These techniques are:-

"Problem Census", "circular response", "agenda building", and "brain storming", "Be-Hive" or "Buzz Groups", "Problem Solving", and "Role Playing". The evaluation has also been discussed as one of the techniques which can help in the assessment of group activity and ultimately in group development.

I. Problem Census

(i) A teacher may ask specific questions in order to know the exact problems, e.g. what are your difficulties in getting loans from the local cooperative?
(ii) For collection of problems, the techniques of 'circular response' may be used. According to it, the group members are asked to sit in a circle, facing each other. The teacher then asks students one by one to give answer. He may start clockwise or anticlockwise, and complete the circle. However, he does not force any of his student to give a reply. He should write down in brief the problems enumerated on the blackboard, without much discussion.
(iii) Classification of problems: The problems collected should be clarified and classified according to the purpose. For example, problems which can be solved by students can be put in one group.
(iv) Giving priority to problems (agenda building): Out of the problems classified, important ones should be selected and put in shape of agenda for further discussion.

II. The technique of 'Problem Solving' should ensure the following steps:

(1) Identification of the real problem e.g. farmers pay more when they are not organised.
(2) Collection of facts and relevant figures for solving problems, e.g. the rate of interest charged by private traders, and by the cooperative societies, etc.
(3) Analysis & Projection: Finding out suitable solutions (through brain-storming, buzz groups, etc., to be discussed later).
(4) Decision Making: Selection of suitable means out of the alternative ways to solve the problems e.g. organization of a thrift and credit society, and education of members for that purpose. The technique of 'role playing' may help in focussing on problems in implementing a decision.
(5) Action e.g. calling a meeting of active farmers with the help of the local cooperative educators, and deciding to have study circle on by-laws of a thrift and credit society.
(6) Evaluation of results: whether members participate in the meetings of study circle and are ready to organise a thrift and credit society.

III. Brain Storming :

Members of the Group are asked to suggest solutions to the problems identified. They should be encouraged to give their solutions spontaneously, without much reference to their limitations 'ifs' and 'buts'. No body shall be allowed to judge or laugh at any one for giving impractical suggestions. The teacher may say 'wilder the better'. It is better to record all the suggestions on black-board as fast as possible, possibly with the assistance of one of the members of the group. In this way a list of solutions can be collected by storming the brains of students. There should be a time-limit fixed for each session (4-5 minutes).

IV. An example of "Role Playing":
(time allowed: 10 minutes)

There has been serious mismanagement in the local thrift and loan society. This has been revealed partly in the regular process of supervising the activities of the society, partly by a series of complaints by different members to the Cooperative Department. Some of the complaints are:

(1) The chairman uses the cash of the society for his own purpose. (Example: when the auditor asked the society's cash to be produced (395.75) he produced four notes of 100 each and said the society's money was included in the 400).
(2) The accounts of the society are not written regularly. (A member of the managing committee asked for the cashbook to be shown to him and it was found that the book was not written for 3 months).
(3) The general body meeting of the society was not called in time as per usual practice.
(4) There are 80% arrears of loan due from members. No action has been taken against such members who have not repaid last year's loans. New loans have been given only to a few members known to the chairman even though they had not paid last year's arrears.

(5) The society has not been able to complete the building, the amount for which was sanctioned last year. Government subsidy for the purpose has not been drawn so far although it was sanctioned.

A Cooperative Officer visits the society and the meeting of the executive committee is held. One complaining member has been called to explain his grievances at the meeting. One of the members is assigned the role of the cooperative officer, 2 others amongst them are chairman and secretary of the society, and some of the participants act as committee members. Whatever happens at the meeting is observed by rest of the members. Soon after the role playing session, the observing participants are asked to give their comments about the behaviour of role players and lesson derived from the session.

The purpose of this illustration is to show a method whereby it is possible to effectively teach the members the importance of active member control and make them understand some of the issues involved in the effective operation of the society. The most important result is that the members perceive social relationship better by playing different roles and thus experiencing the feelings of others and appreciating their points of view. One or two members of the participating group may be appointed by the teacher as special observers to watch the functioning of the group.

"Be-Hive" (approximate time allowed : 5-6 minutes) An Example:

A cooperative society is faced with the problems of insufficient utilization of its marketing facilities. The members do not send their produce regularly but often sell it through other channels. The general body has on its agenda a discussion of this problem. The managing committee is anxious to know more adequately the members' own reasons for not utilizing the services of the society to the desirable extent.

An Education Officer from the district cooperative union has come to the general body meeting to help discuss the problem with the members. He decides to divide, at random, the members present in the meeting into five groups. The groups are asked to elect their own chairmen and secretaries and find out the main reasons of their non-patronage to cooperative society. The groups are expected to work separately but in proximity with each other so that their 'buzzing' sound may accelerate the work of different groups. After 5-6 minutes the groups assemble again the general session. Each group has to give within 10 minutes the main reasons for the non-patronage of members to the cooperative society.

One of the purposes of this demonstration is to show how a cooperative educator can evoke a lively response from his audience in a general body meeting where conventional methods, such as lectures, often fail to produce member participation.

Evaluation

Assessment of educational programme can be either internal or external. It can be a combination of both. By internal evaluation we mean that the participants and organizers in the programme together assess their achievements and failures so that performance of both parties could be improved by gaining insight into problems and through refreshed approach for solving these problems. This type of evaluation should be encouraged in cooperative education programmes. Internal evaluation should be periodic and final.

It is necessary to define in advance the immediate objective, intermediatory goals and final aims of any educational programme, before the educational programme is evaluated with the help of several methods. Internal evaluation, if conducted properly, makes the group increasingly active and responsible.

Sometimes, groups of students can be given group tasks such as discussion on a question of common concern, enactment of a play, group singing, picnic, study forum etc. The task should be common to all the groups, so that the performance of one group may be compared with other groups with the help of common criteria. If a group achieves a score in assessment, say 15 out of 20, then each member of that group should receive 15 scores. The inter-group comparison will generate competitiveness and ultimately cohesiveness within each group.

A group game for self assessment of integrative and disintegrative behaviour by the group members is given in the following page.

by gaining insight into problems and through refreshed approach for solving these problems. This type of evaluation should be encouraged in cooperative education programmes. Internal evaluation should be periodic and final.

It is necessary to define in advance the immediate objective, intermediatory goals and final aims of any educational programme, before the educational programme is evaluated with the help of several methods. Internal evaluation, if conducted properly, makes the group increasingly active and responsible.

Sometimes, groups of students can be given group tasks such as discussion on a question of common concern, enactment of a play, group singing, picnic, study forum etc. The task should be common to all the groups, so that the performance of one group may be compared with other groups with the help of common criteria. If a group achieves a score in assessment, say 15 out of 20, then each member of that group should receive 15 scores. The inter-group comparison will generate competitiveness and ultimately cohesiveness within each group.

A group game for self assessment of integrative and disintegrative behaviour by the group members is given in the following page.

A Group Game for Assessment

of

INTEGRATIVE Vs. DISINTEGRATIVE BEHAVIOUR

Individual behaviour either builds or destroys a group. The following terms represent either integrative or disintegrative behaviour of a group member including the leader. These terms may be reproduced each on a separate card (omit the numbers) and distributed to the members of a group as they assemble. The group should be instructed to assemble in two sub-groups according to the way the terms fit together to define a certain type of behavior. If the two subgroups are correctly formed, the cards will be held as indicated by the two lists. This should provide plenty of discussion.

Integrative Behavior	Disintegrative Behavior
1. Approves & helps in correction	1. Blames & corrects
2. Concedes differences	2. Accepts no differences
3. Discusses	3. Lectures
4. Expedites	4. Postpones
5. Extends invitation to participate	5. Warns, threatens
6. Flexibility	6. Rigidity
7. Grants permission or requests	7. Refuses requests
8. Helps define the problem	8. Insists he is right
9. Participates	9. Withdraws from activity
10. Protects status of others	10. Attacks status of others
11. Suggests broadly	11. Wants to determine details
12. Sympathetic	12. Unsympathetic
13. Wants consideration of his views.	13. Wants his way.

Out of the following titles, select the most suitable cne for the lists given above.

Builders	Versus	Wreckers
Democrats	"	Autocrats
Peacemakers	"	Quarrel makers

oo 00 oo

:nmb: 09-01-80

MODALITIES OF A TRAINING PACKAGE

Dr. S. C. Mehta
Professor
V.M. National Institute of
Cooperative Management
PUNE (INDIA)

Communication Process

The communication process in the class room is a vital ingredient in a teaching situation. The teacher has an idea which he wishes to put across to the learner. For this purpose, it is instantly coded into vocal and visual symbols and then transmitted orally with the help of illustrations, drawings or written words. These coded symbols are captured through the eyes and ears of the student. Whether the idea or the message is registered with the student may be reflected in a smile, laughter, nodding of the head or facial expressions. In case the transmission is not effected, the teacher may repeat the action or adopt a different method to achieve it.

Advantages of Audio-Visual Aids

Since the lecture method has a number of limitations, the audio-visual media constitute the basic tools of communication in the class room, may be for supplementing a good lecture. The right use of such aids accelerate the learning process and help the student to comprehend complex problems easily. It also stimulates their interests, kills boredom and involves the learner in the teaching process. In certain subjects, visualizing is absolutely essential. For instance, different types of plants can only be taught through illustrations of the plants. But audio-visual aids cannot be over-used and any selection of these aids must ensure that these are relevant and are serving useful purpose.

Concept of a Training Package

By a training package, we mean an instructional device presenting a systematic collection and arrangement of educational material on a particular subject, divided into self- contained modules, so as to forge an effective mode of transferring knowledge and skill to the learner through the use of relevant audio-visual-aids, exercises and evaluation devices.

The packages are produced through the combined efforts of the teacher, subject matter specialists and resource persons. They are today employed in Management and Vocational Training so as to avoid wastage of manpower, time and resources. The training package is a sort of self-instruction or programmed instruction method of training. However, several factors may mar its effectiveness, viz, more costs, longer time for preparations and constant modifications required.

Selection of the subject:

There are some items responsive to the audio-visual media while others are not. Some topics may be covered through case methods, some through role-plays and some through the simple lecture-cum-discussion method. Only a few topics may be capable of effective utilization of audio-visual techniques.

Modules

After the subject has been chosen, it will have to be divided into Chapters which are known as "Modules". These modules are more or less of an equal size and though they are inter-related with other modules, they may be used as self-contained units also. For instance, a training package of Retail Management may have the following modules

(1) Shop Location,
(2) Assortment of Articles,

(3) Layout and Display,
(4) Purchase and Inventory Management,
(5) Packaging,
(6) Salesmanship,
(7) Personnel Management,
(8) Accounting,
(9) Customer Relations and Information.

Suppose, we wish to prepare a package for only one module, say, for shop layout and display, then shop layout and display separately would be the subject matters of two sub-modules. These could be used individually as well as a part of the training package on Retail Management.

<u>Duration</u>

The duration of a package or a module will have to be decided, in a manner, so that the subject matter is properly absorbed and assimilated by the students. The preparation of the package would have to be done keeping the duration in view.

<u>Target Population</u>

The teacher has to decide for whom this package is meant. That means the characteristics of the target population, their job, age, qualifications, experience and other relevant factors, It is necessary that the package should suit the level of their intelligence. The package meant for floor supervisors may not be of use for departmental managers,

<u>Aim of the Package</u>

It is important to define the main aim of the package, for instance, the package on shop layout and display aims at better perception of the trainees in this area, leading to increased sales. Further, we should not be obsessed with too many aims. We may, however, formulate other related objectives which may be achieved through teaching with the package.

<u>Project format</u>

In order to achieve precision and crystallise our thinking on the subject, we should layout a detailed plan, containing all the above decisions. The quality of the package would relate much to the comprehensive and imaginative formulation of the plan.

<u>Collection of Materials</u>

Collection of material is one of the most important components of producing a training package and require systematic planning so as to avoid waste of money, time and effort, which are always in short supply. The information may be obtained through case studies, personal interviews, primary data, library resources, consultations with subject matter/specialists and practical visits to the fields. During the data-gathering process, the producer should systematize and record the material under particular categories. This categorization will facilitate the compiling, sifting and sequencing of the material for script writing.

<u>Choice of media</u>

The critical stage is that of the choice of media and visualization. This will depend on several factors: (1) Confidence of the teacher (2) His general knowledge in the audio-visual field (3) The sensitivity of the audience (4) Complexity of the material (5) Infrastructure available to the teacher for production (6) Cost constraint (7) Institutional support and (8) Nature of the class-room.

Visualization

In this process he has to be in constant touch and consultation with the audio-visual experts and should discuss his script with them in a serious manner. He will still be able to decide the scheme of visualization and the type of visual aids needed. Then the task of visualization and illustration work could be entrusted to the audio-visual artists, photographers, printers, etc. The format and the layout work will have to be planned sedulously so that all the visuals fit in their proper position. The whole preparation may again be checked up and modified where corrections are needed.

Field testing

The reliability and suitability of the package will then be field-tested with regard to:

(1) Validity of the material,
(2) Effectiveness of the sequence,
(3) Effectiveness of various visual aids employed.

The package should be improved in the light of the feed-back received. Testing can be done in: (a) class-room before the type of students for whom it has to be used (b) before the management specialists (c) in the real life situation. The comments of the testing group should be noted by the teacher. He should also distribute the Evaluation Form for knowing their reactions with regard to the above aspects. All these observations should be analyzed by the producer-teacher objectively and necessary modifications may be carried out by him in the light of these suggestions. Even after a package has been perfected, it requires periodical review and up-dating in the light of changed circumstances and experience.

How to use the Training Package?

The teacher should be thorough with the subject matter for which the training package is prepared. He must be competent to use the necessary hardware like overhead projector, slide projector, magnetic board, etc. He should have supplementary notes with him for his guidance. The class-room should be properly lighted and equipped with the necessary audio-visual equipments. Any preparations in this behalf should be done in advance.

When the lesson is in progress, it should not be a one-way traffic but the students should have opportunities to ask questions and sometime the teacher himself should ask questions for arousing their interest. He should give sufficient time to the students to take the notes. If necessary, he may repeat the particular item of visual aid exhibits. When two or more aids are employed, the sequence should be properly set in advance. After the presentation of the package, the teacher should distribute an Evaluation Sheet for eliciting the reaction of the participants. In addition, he should also distribute a small hand-out to the students on the subject which may supplement the notes taken by them.

An outline of script of the package on "Display"

A. Type of fixtures - (i) Trays, hooks, baskets, cupboards, hangers, sacks
(ii) Made of material: wood, iron, plastic, aluminum, glass, bamboo

B. Fixtures vary with commodities - fruits, handicrafts, cosmetics, foodgrains, textiles, shoes, books, electric food, ceramics, etc.

C. Guidelines about racks -
Principles of arrangements - How not to arrange.

D. Different types of arrangements - saris - Preservatives

E. Indicator - Advertisements, membership campaigns, departments, commodities, prices.

F. Lighting - colour, denseness

G. Colour

H. Frontage - parking, moving space, gangway, window display

I. Interior decoration - panelling, ceiling, interior display, baloons.

J. In Good Display - Place sells not Persons.

* * * * *

SCM/tav/10/7/80

AUDIO-VISUAL AIDS & COOPERATIVE EDUCATION

By

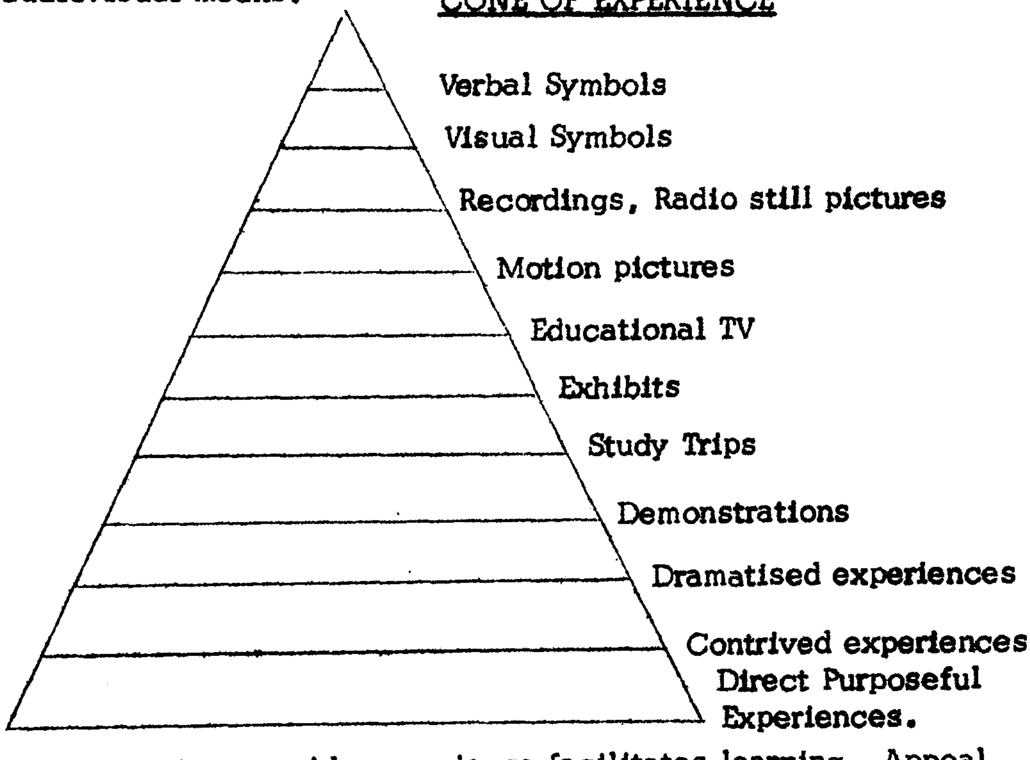
Dr. D. Vir, Specialist in Educational Methods, ICA, R.O. & EC, New Delhi.

---

1. This is an age of communication. Our ideal is 100% communication i.e. sharing of ideas, attitudes or skills between trainers and trainees. If the students have not learnt, it would mean that teachers have not taught.

1.1. Psychological researches indicate that more than 80% learning occurs through direct purposeful experience and self-directed activities of learners. Nevertheless, a modern teacher knows that about 50% of human learning takes place through eyes and ears and therefore the learning through these sense-organs is to be made more effective with the help of audio-visual aids. He also knows that only 10% learning is achieved by reading or hearing words. The amount of learning can be shown through the cone of experience. As cooperative education deals with many abstract ideas and management concepts, it is more necessary for us to use audiovisual means.

CONE OF EXPERIENCE



1.2. The rich and memorable experience facilitates learning. Appeal to several senses such as sight and hearing makes learning more effective. The learning effectiveness in terms of memory can be seen the following chart:

Learning through	Effectiveness
1. Sight	70%
2. Hearing	20%
3. Touch	5%
4. Smell	5%
5. Speech	Nil

1.3. It may be noted that speech does not contribute to learning effectiveness. We can not learn and retain new ideas when we are busy in proclaiming our own old ideas. It is difficult to statistical figures on human learning. However, it is certain that most of such learning takes through eyes and ears.

2. Classification of Audiovisual Aids

There are many types of aids which a teacher can use to make his lesson increasingly effective. These aids can be classified as projected and nonprojected or graphic aids. The following classification is presented for discussion:

a. Audio aids - Tape recordings, gramophone records, radio broadcasts.
b. Visual aids - Chalk boards, magnetic boards, charts, posters, flannelgraphs, photographs, bulletin boards, exhibits, slides, film-strips, silent films, etc.
c. Audio-Visual Aids - Motion pictures, television, programmes close circuit T.V. (Video-tapes), drama, puppetry, etc.

2.1. Motion pictures or films have the unique advantage of being audio, visual in movement. Most of the time, teachers do not have suitable audio-visual aids for their use. However, sometimes there are many aids available on one topic. For example, one can find many posters and charts depicting the advantages or the principles of cooperation. Under such circumstances, a teacher will examine the aids available and choose the best. A comprehensive catalogue of audio-visual aids will go a long way in helping the teacher to choose the most suitable ones for his purpose. There are many aids prepared in advanced countries and distributed in developing countries. For example, some foreign missions in a country maintain loan libraries of excellent films and filmstrips in different countries. However, it is difficult for us to use many of such aids effectively in cooperative education programmes as they hardly touch on local problems, Of course these aids have informative and inspirational value, and therefore they can be used by a teacher after making a careful selection.

3. Some Criteria for Selection of Audio-Visual Aids

Answers to the following questions will help a trainer to ascertain the value of our aid in relation to this lesson plan:

i. Does it contribute satisfactorily to the topic under study?
ii. Can the aid serve the purpose of the lesson and be adapted to local conditions?
iii. Is the aid worth the time, expense and effort involved in procuring, using and maintaining it?
iv. Is the material in satisfactory condition?
v. Are the aids and other facilities to be used readily available?
vi. Is the aid suitable for the age, intelligence tastes and experience of learners?
vii. Is the aid suitable for the size of the group to be taught?
viii. Does it make learners think critically and objectively?
ix. Does it arouse and sustain genuine interest of learners?

1.3. It may be noted that speech does not contribute to learning effectiveness. We can not learn and retain new ideas when we are busy in proclaiming our own old ideas. It is difficult to statistical figures on human learning. However, it is certain that most of such learning takes through eyes and ears.

2. Classification of Audiovisual Aids

There are many types of aids which a teacher can use to make his lesson increasingly effective. These aids can be classified as projected and nonprojected or graphic aids. The following classification is presented for discussion:

a. Audio aids	-	Tape recordings, gramophone records, radio broadcasts.
b. Visual aids	-	Chalk boards, magnetic boards, charts, posters, flannelgraphs, photographs, bulletin boards, exhibits, slides, film-strips, silent films, etc.
c. Audio-Visual Aids	-	Motion pictures, television, programmes close circuit T.V. (Video-tapes), drama, puppetry, etc.

2.1. Motion pictures or films have the unique advantage of being audio, visual in movement. Most of the time, teachers do not have suitable audio-visual aids for their use. However, sometimes there are many aids available on one topic. For example, one can find many posters and charts depicting the advantages or the principles of cooperation. Under such circumstances, a teacher will examine the aids available and choose the best. A comprehensive catalogue of audio-visual aids will go a long way in helping the teacher to choose the most suitable ones for his purpose. There are many aids prepared in advanced countries and distributed in developing countries. For example, some foreign missions in a country maintain loan libraries of excellent films and filmstrips in different countries. However, it is difficult for us to use many of such aids effectively in cooperative education programmes as they hardly touch on local problems, Of course these aids have informative and inspirational value, and therefore they can be used by a teacher after making a careful selection.

3. Some Criteria for Selection of Audio-Visual Aids

Answers to the following questions will help a trainer to ascertain the value of our aid in relation to this lesson plan:

i. Does it contribute satisfactorily to the topic under study?
ii. Can the aid serve the purpose of the lesson and be adapted to local conditions?
iii. Is the aid worth the time, expense and effort involved in procuring, using and maintaining it?
iv. Is the material in satisfactory condition?
v. Are the aids and other facilities to be used readily available?
vi. Is the aid suitable for the age, intelligence tastes and experience of learners?
vii. Is the aid suitable for the size of the group to be taught?
viii. Does it make learners think critically and objectively?
ix. Does it arouse and sustain genuine interest of learners?

x. Is the aid realistic and factually accurate ?
xi. Does the aid help to improve the relationship between the trainers and the participants ?
xii. Is there a teachers' guide available to help in the proper use of material ?

It may be remembered that an audio-visual aid is not used in isolation. The most effective way is to use a combination of aids to achieve an educational objective.

Use of Non-Projected Aids

1. Chalkboard

It is a piece of commercial ply about 5cm thick of desired length and breadth. Its one surface is painted with chalkboard surfacer (generally four coats-two vertical and two horizontal) either in black or in grey or green. Choice of colour is optional. The board may either be mounted on to the wall in front of the audience or kept on a board stand. Chalks of various colours are used for writing. Dustless chalks are also available these days. Chalks should be soft so that they do not screech when you write on the board.

Advantages

- Generally available and inexpensive
- durable
- gives larger area for the user
- large enough to be seen by the audience
- requires no advance preparation
- ideal for mathematical work, illustrations and diagrams

Limitations

- requires the teacher to turn away from the class
- the teacher tends to ignore his audience and speak to the board
- dusty and messy to hands, clothes and to the nearby equipment e.g. OHP
- dramatic and unusual effects not easily possible.

Cautions

- write for the audience and not for yourself
- use capital letters for better clarity

* Extract from the Training Package on TEACHING TECHNIQUES ICA/ILO Course in Training Methodology and Techniques of Cooperative Staff Training in S-E Asia - Pune & Turin, 1977.

- use colour chalks for emphasis
- use dustless chalks when possible

2. Flip charts

A number of large sized (generally 100cm x 80 cm) white sheets are clipped together on the top and pegged on to a plain board which is mounted or rested on a board stand, newsprint, brown packing paper or white glazed paper can be used for flip overs. Water-based markers (also called magic ink pens) are used to write on these sheets. Sheets are to be turned over after use. Charts can be prepared also in advance, otherwise use them like the chalkboard. It is something like a big sketchbook.

Advantages

- good for explaining a story which needs only outlines or simple figures
- useful for one time briefing which does not need any advance and elaborate preparations
- it is quick and avoids dust, mess and time in erasing. Simply turn the sheets over
- Sheets can be returned for revision and summarisation
- Easily available and inexpensive
- Portable flipovers with stand are commercially available now.

Limitations

- although the sheet is large enough yet the writing space tends to be limited
- presents some transportation problems
- dramatic effect is limited
- storing is difficult as curling takes place due to rolling (for storing, either the sheets have to be laid flat, or suspended along with the wall or in a specially designed frame.)

Cautions

- conceal the top of the chart with a blank sheet until ready for use

- turn the sheet over carefully otherwise it might tear and cause disturbance in the class
- stand on one side of the flipcharts while using them
- when finished with the talk, roll up the pages "topside out" so that when you use them next, the bottom of the sheets will not curl towards the audience
- always keep some felt pens (markers, magic ink pens) ready as they tend to dry up fast-so check the markers before using them (it is always good and useful to keep the markers with their top on).
- draw illustrations in light yellow pencil in advance if these are to be presented in the class - this will save time and also you can demonstrate a bit of your confidence to your audience.

. Flannelgraph

The essential parts of the flannelgraph are a paper surface seen by the audience and flock paper used on the backsides. The flock paper enables the visuals to stay in place when it is placed on a piece of flannelcloth. Sandpaper, blotting paper, felt, flannel can be used in place of flock. Foam rubber sponge, light balsa wood and nylon hook and loop material will also do the job. The illustrations are drawn on thick cardboard and are cut out properly. The flock paper is then fixed on the back side of these illustrations. Each illustration is numbered in a serial order on the reverse side in the same order in which they will appear on the board. This is done keeping in view the theme of the story to be told. Illustrations can be obtained from various journals and magazines or drawn free hand by the trainer.

Advantages

- not very expensive to make
- is not very technical
- can be prepared beforehand and permits re-use
- builds up the story in a logical manner
- attracts and holds attention due to its characteristic and colour
- illustrations can be altered, replaced easily
- can be used to communicate any idea cooperative mathematical or scientific
- ideal for use in employee training and member education
- permits dramatic effects
- do it yourself models easy to construct

Limitations

- cannot be used as a chalkboard for writing
- visuals have to be prepared in advance

Cautions

- number the visuals carefully
- rehearse before use
- keep the visuals and theme in one cover
- keep the flannelcloth clean and brushed up for better hold of illustrations by the flock.

Use of Projected Aids

4. Overhead Projector

This machine projects large-size trans-parent images onto a cinema screen under normal daylight conditions. The light originates in front of the teacher and projects behind him enabling the teacher to continuously remain in direct touch with his students. Transparencies or acetate sheets are used to write on. The teacher writes on them as he would on a note book and the image would be something like the ones written on a chalk-board. Transparencies can be conveniently produced by drawing or writing directly on the sheets with a spirit-based felt pen. They may also be prepared using a photocopy system. Cardboard frames are used as mounts to these transparencies for storage and longer use. These mounts are also used for preparing overlays.

Advantages

- the trainer can always face the audience
- he can use and write on the transparencies sitting down. He can continue making notes on these without being noticeable
- self-made, commercially prepared, coloured, overlayed and a variety of transparencies can be used
- roll of plastic sheet can be used as a chalkboard
- easier to write on a horizontal stage
- permits use of colour
- permits use of window type transparencies
- it is clean and quick
- can be used in bright room

Limitations

- some pens smudge and colour the fingers and spoil the transparencies
- involves heavy equipment - projector, transparencies, screen, pens
- transportation problems
- light from the machine and the screen can affect the eyes of the user
- improper placement of screen may distort the projection and may give a keystone effect
- electricity supply has to be constant and it should be available in all classrooms
- cannot modify the transparencies procured from professionals

Cautions

- prepare your transparencies in exact sequence
- rehearse the theme and the material before use
- do not point to the projection of the screen. (point on the transparency with a pencil)
- ensure that the projection screen is parallel to the level of the lens of the projector to avoid keystone effect
- switch off the projector when not in use
- do not move the projector while it is still hot otherwise the bulb will get damaged
- test the felt pens before use and keep them capped when not in use. They may dry up.

5. Slides and Filmstrips

One single photograph taken on a transparent film, duly mounted, is taken on 35 mm film (colour or black and white). It may be mounted in glass, plastic or cardboard and the mount is always 2 inches square. Instead of cutting up 35mm film into individual frames and mounting them separately, they are often preserved in strip form which are called filmstrips. Filmstrip frames may either be full-size (36 x 24mm) or half size (22 x 18mm). Strips run through the projector either vertically or horizontally and it is important to check which way your filmstrip goes and ensure that it will fit into your projector.

Slides constitute one of the easiest amateur means of bringing real-life situations into the classroom. Less expensive and simpler to operate than film, easier to edit and present the ideas. These can be presented either with an oral and instant commentary or with a pre-recorded synchronised commentary. Unrelated slides can be taken away if needed. This is not possible with filmstrip which have to run through its full length.

These are the most potential means of communication if properly and carefully employed for a group of 25-40 persons.

Advantages

- easier to make with not much of costs
- ideal for communicating ideas to a group at one time
- real commentary is possible and language is no obstacle
- slides can be interpreted differently when needed
- easy to carry around, store and retrieve
- can be used over and over again
- enables a quick feedback from the audience

Limitations

- because of the technical equipment some trainers tend to keep away
- replacement of a particular slide is not easy as it involves taking fresh pictures which means time and effort
- filmstrip is rendered useless if one of its frames runs out of context
- room needs to be darkened

Cautions

- needs to be carefully related to the subject and an advance rehearsal is necessary
- keep the supporting notes ready for oral commentary
- retain the frame for longer duration where needed for a better understanding
- do not touch the middle of the slides with oily fingers and do not leave them near heat and moisture.

6. Films

Motion films have a great role to play in cooperative education and training programmes. A broad categorisation of films, which involves a certain degree of overlapping is: (1) informational, (2) skill or drill (3) appreciation, (4) documentary (5) recreating (6) dramatic or episodic, (7) custom (8) news (9) scientific, industrial and technical (10) provocative.

Informational films inform, instruct or provide knowledge about people, a process, material events, geography, social conditions, past events, occupation and theories. They are true teaching films because they provide understanding and act as a teacher. Films, carefully selected and related to the subject matter, can therefore help reinforce knowledge and information.

Motion pictures are produced in four sizes e.g. 70mm, 35mm, 16mm and 8mm, both in black and white and colour. 16 mm and 8mm are the most suitable for education and training purposes.

Screening of films involve the use of projector, screen and a variety of films. The room need to be darkened and the sound system to be effective and pleasant. Also a qualified and experienced projectionist is a must. There should also be a proper storage, retrieval, and maintenance service to put this effective media to a proper use.

Advantages

- can communicate one single idea at one time to a large number of people
- audio and visual effects are presented at one time
- can present a real life situation through the medium of camera and the projector
- films provide variety and stimulate interest
- gives greater information in shorter duration
- it brings outside in the classroom

Limitations

- quite complicated to use
- needs elaborate operations to use
- selection and availability of relevant films is difficult
- editing or change is not possible
- verbal commentary and dialogues cannot be changed
- expensive and technical

Cautions

- select only the relevant film and preview it before making its use
- let the technician handle the projector
- do not touch the film in the middle and with wet or oily hands
- keep the projector clean and ready for use
- use the accompanying notes for teaching while using the film

oo 00 oo

:nmb:090980

A

DRAFT

MANUAL ON PRODUCTION OF TRAINING PACKAGE BASED ON AUDIO-VISUAL AIDS

C E M A S U N I T
International Cooperative Alliance
Regional Office & Education Centre for South-East Asia
Bonow House, 43 Friends Colony
New Delhi - 110065
INDIA

CONTENTS

CHAPTER - I: COMMUNICATION PROCESS AND THE ROLE OF AUDIO-VISUAL AIDS

INTRODUCTION

Communication in teaching is the process of passing on certain message(be it knowledge, know-how, skills) from the teacher to the learner, and learning is the process of understanding the communication and adaptation of the message (knowledge, know-how, skills). Thus, all teaching is a matter of communication - preferably two-way communication in which the learners benefit from the teacher's specific knowledge (of certain topics, skills, and know-how) and the teacher benefits from the experience, practice, and general knowledge of the students. The aim of all teaching therefore could be identified as to cover the knowledge/information/skills in such a way that as far as possible it is understandable and applicable by the learner.

From the above it is quite clear that effective communication is an important element in a teaching/learning situation.

From teacher's angle effective communication depends on the following two main factors:

i) - the teacher has something to teach, has a message, has specific knowledge.

ii) - the teacher has the knowledge of the techniques, tools and methods to pass on his knowledge (message).

The purpose of teaching therefore could be identified as "to help the student to understand and not merely to instruct", which means that teaching to be effective must have perfect communication.

Elements of Communication Process

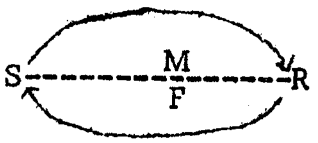
It is general view of the experts that message does not contain any meaning but meaning is attributed to the message by the receiver according to his knowledge and understanding. The point could be further clarified if one looks to the basic ingredients in communication process in the teaching system.

These are: (a) the sender of the message (teacher), (b) the message (knowledge/know-how/skills), (c) the receiver of the message (the learner).

S - - - M - - - R

S - sender
M- message
R - receiver

The teacher(s) who has some message sends it to learner (R). As pointed out earlier the messages of the teacher is generally in the coded form such as in the form of words, sign and symbols etc. The learner (R) receives these and tries to understand and adapt them. Hence much depends on how his understanding and adaptation of the message is in confirmity with knowledge and understanding of the teacher. If the learner reacts to the teacher about the message, and if the teacher finds that the reactions shows the proper understanding of his message, he could be assume that communication is effective and vice-versa. The reaction of the learner communicated to the teacher is called the "feed-back" process in communication which helps in correcting the break-down points in communication. The modern communication process in teaching visualizes the two-way process of communication as indicated below:



S - Sender of message
M - Message in coded form
R - Receiver of Message
F - Feed-back

The feed back received by the teacher helps him in determining the accuracy of the message.

Role of Visual-Aids

It has been indicated earlier that one of the precondition of effecting teaching is that the teacher has the knowledge of the techniques, tools and appropriate method of communication. It is in this context that various techniques of teaching and training have been developed to make the teaching and communication more effective. Experience have shown that appropriate use of audio-visual aids as communication tool is one of the most effective technique in modern teaching. A picture or a symbol is worth thousand words. It is in this context that the concept of Training Package based on audio-visual aids has been developed. The assumptions are that a given lesson plan of teacher based on well-designed audio-visual aids would enhance the learning process and save the learning time of both the learner and the teacher. The visual aids help the student to perceive various problems more easily by stimulating their interest, removing monopoly, and involving them mentally.

CHAPTER - II: CONCEPT OF A TRAINING PACKAGE

Meaning of Training Package

The growing realization of the need of making the training effective has given birth to a new approach in training commonly known as the technique of training package based on audio-visual aids. The dictionary meaning of 'Package' refers to the act, manner or privilege of packing: a case or other receptable for packing goods, in a pack form. In its crude sense the word training package also refers to a systematic collection and arrangement of training and educational material on a particular subject based on audio-visual aids and placing them in a packet. Thus it could be defined as an instructional device containing training/educational material divided into cohesive modules and facilitating an effective mode of transferring knowledge and skills through the use of appropriate audio-visual aids, exercises and evaluation devices.

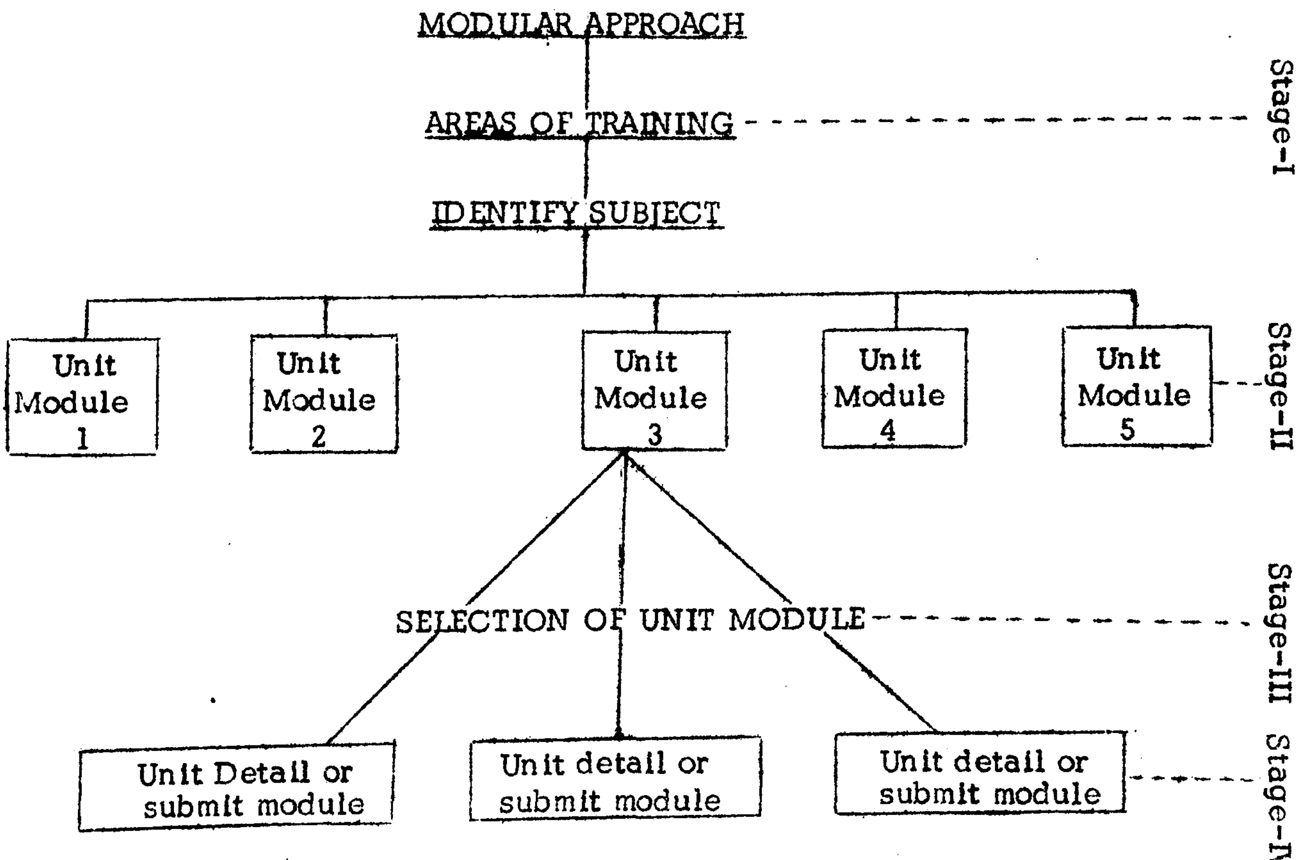
The concept of Training Package is based on the development of Modular approach in lesson planning for the purpose of imparting training.

What is Modular Approach

The modular approach in lesson planning aims at firstly, identification of main subject area, secondly breaking of the subject area into specific topics (called unit module) and thirdly dividing the topics (unit module) into sub-topics (called unit detail or sub-unit module).

The training materials prepared under the modular approach, each unit module or sub-unit module though consist of independent material they in fact remain inter-related. Each unit could either be used independently or can be put together to meet the total requirement of a given subject matter area of training.

FIGURE - I



Stages in Training Package

It will appear from figure-I that the modular approach which is adopted in the preparation of the training package has got four primary stages before the actual work of training package based on audio-visual aids are undertaken.

The first stage refers to identification of the training area and the subject area to meet the requirements. The second stages refers to breaking of the subject area into specific topics which may fall under the subject area. The figure-I shows that there are 5 topics in a given subject area.

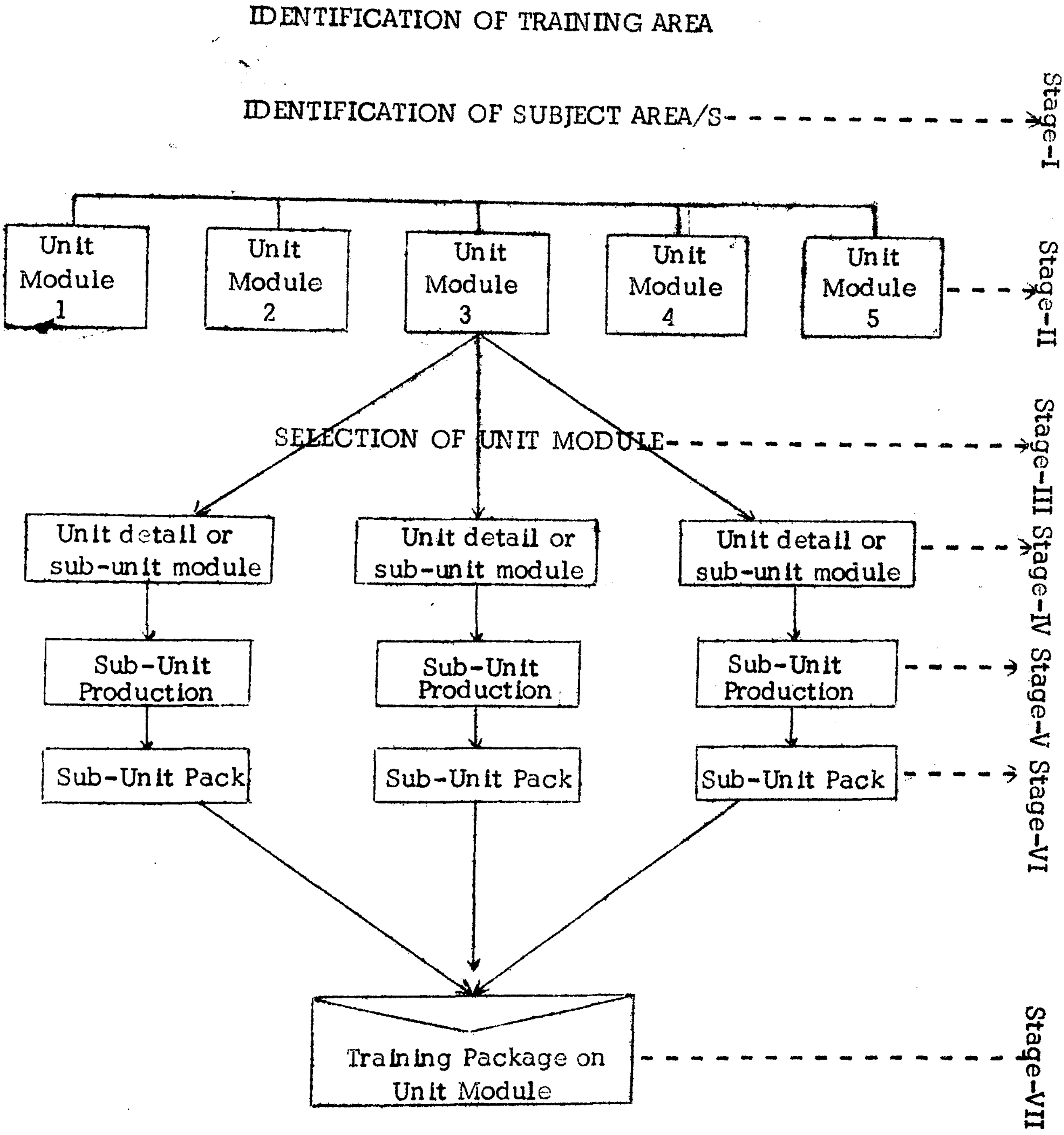
The third stage requires identification of the specific topic to meet the specific training needs in the subject area. For example one may identify unit module 3 (subject topic) as the specific area of training (figure-I). After the third stage in which the unit module is identified the next task is to break this unit-module (subject topic) into sub-unit module. This means that each topic should further be sub-divided into minute details according to the training needs in the specific area. In figure-I the unit module 3 is selected as the area of training which is again sub-divided into 3 sub-unit modules which will necessitate detail subject matter analysis of the unit module 3.

To some extent trainers have been adopting the modular approach in the preparation of the lesson plans even before the development of the concept of Training Package as a modern training technique. However, the efforts in this direction has been of casual nature rather than based on scientifically evolved modular system.

The concept of training package has added new dimensions to the modular approach in the sense that it is a step forward to strengthen the modular approach by facilitating the training through the inclusion of audio-visual aids. This is illustrated in figure-II.

FIGURE-II

CONCEPT OF TRAINING PACKAGE

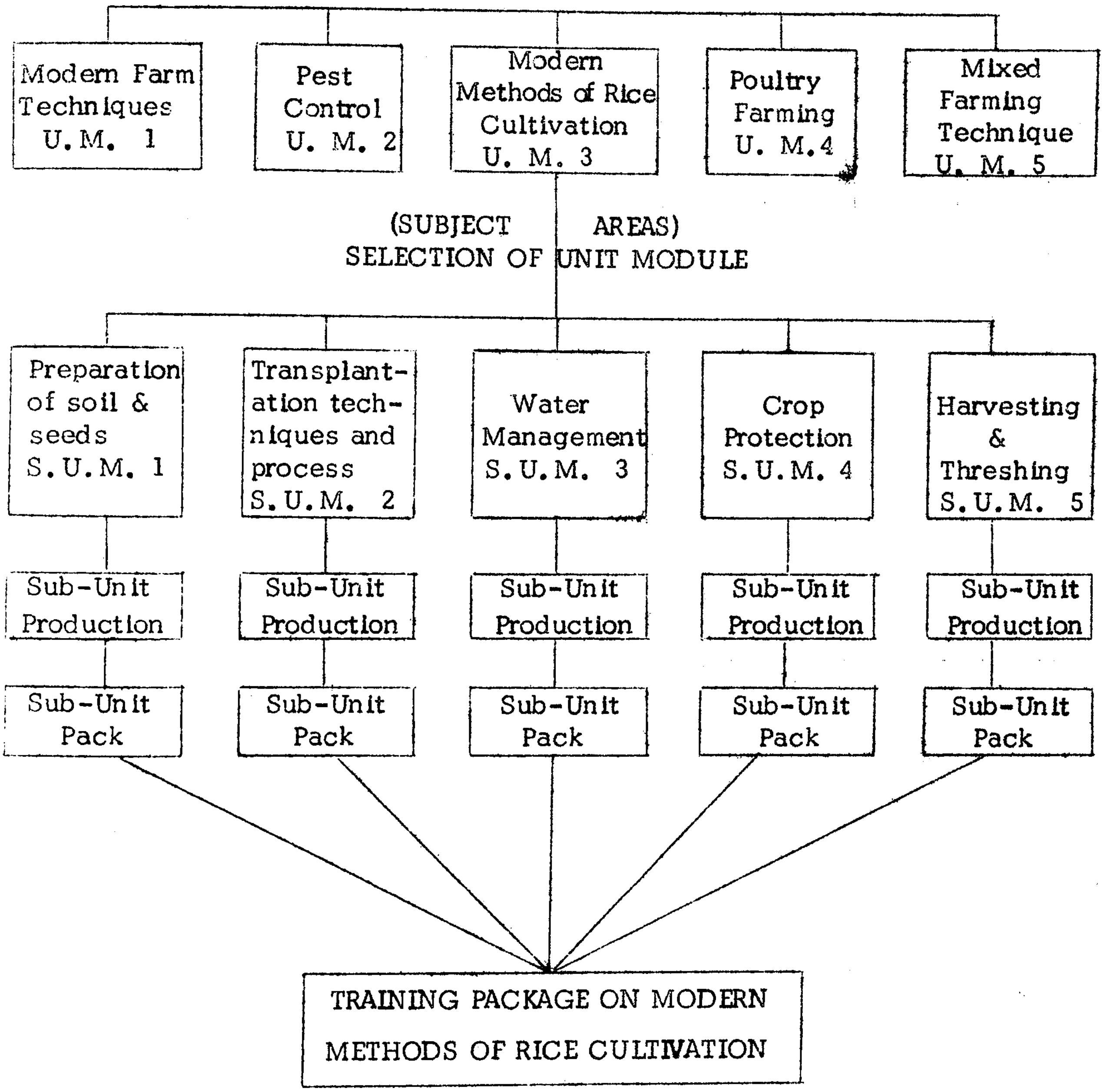


It is apparent from **Figure-II** that after the details of the sub-unit modules are worked out the actual work of preparing a training package starts. According to the approach which is being followed for each sub-unit module, there should be a production plan and actual production of training materials including such materials which are based on audio-visual aids. This assumes that the verbal or written training material has to be reinforced by the appropriate audio-visual aids. Thus, each sub-unit module in a given unit module (subject topic) will have written/verbal training material reinforced by audio-visual aids. These materials are though independent but interrelated. When these independent sub-unit materials are put together they form a complete training package on a given subject area (unit module).

A concrete example is given in Figure-III to further illustrate the point.

FIGURE-III

TRAINING AREA: FARM EXTENSION



U.M. = Unit Module
S.U.M. = Sub-Unit Module

It is apparent from Figure-III that within the subject area of Farm Extension, there could be 5 unit modules dealing with various aspects of Farm Extension. Unit module 3 which deals with the topic of Modern Methods of Rice Cultivation has further been sub-divided into 5 sub-unit modules dealing with specific details of various aspects of the topic (unit modules).

The final stage of preparing the Training Package based on audio-visual aids start with the production of audio-visual material for each of the sub-unit module. This means that for each of the 5 sub-unit module the teaching materials are to be reinforced with audio-visual aids. All these materials are kept separately in a packet and finally all these packets in one pack. This becomes the Training Package on Modern Methods of Rice Cultivation, under the training area of Farm Extension.

Following the similar process on each of the 5 topics of Farm Extension (Unit Modules) a Training Package could be developed.

These training packages on each unit module could then be used either independently to cover a specific topic in Farm Extension or could be used as parts of one Training Package on Farm Extension covering all the identified areas of Training of extension personnel.

CHAPTER III: PLANNING A TRAINING PACKAGE

Choice of Subject

Preparation of a Training Package requires a lot of planning and efforts on the part of teacher as compared to the use of other teaching techniques.

Once a teacher has decided to teach some of the subjects in a given syllabus of a particular course through a training package, his next task is to identify the suitability of a given technique to deal with the subject to make the learning effective. Some topics may better be covered through case method, some through role plays, some would necessitate working out of practical exercise and some topics may be more effective through the lecture method. Yet a few topics may be much more effectively communicated through the technique of Training Package. Of various techniques opened for choice to the teacher, the teacher should select such technique which evidences the best promise. Since the technique of Training Package gives high weightage to the use of audio-visual aids it becomes all the more important for the teacher to be very careful in selecting the technique of Training Package as training technique. If care is not taken in this regard, he may land himself in difficulties in translating the subject matter into visuals which could have been conveyed to the students more conveniently and at minimum cost through some other technique. Therefore in planning to prepare a training package appropriate choice of the subject or identification of the problem to be discussed is the first task before the teacher.

Target Population

A particular subject area could be matter of training for different levels of learners. However, the treatment of the subject will differ according to the level of the learner. This is also true in respect of the media to be selected to deal with a subject. In the preparation of the training package the teacher must clearly identify his target population. What are the characteristics of the students who would be served by it, their job, are group, qualification experiences and other relevant factors. This is necessary because the training package to be effective should meet the level of intelligence of the participants. For example, the specimen of training package on shop layout given at the end of the Manual is meant for middle level managers in a departmental store who are graduates, in the age group 25 to 35 years and have had an experience of working in a retail store for at least 3 years. If this training package is to be used for senior level executives and managers of the store, it would have to undergo considerable modifications. Hence, it is pertinent to ensure that the training package is prepared keeping in view the level of the participants.

Defining Aim and Terminal Objectives

The training objectives could broadly be classified under two heads i.e. Main Aim and the Terminal Objective.

Main Aim of any training programs is stated in a broader context with reference to the broader management needs of the organization. For example, if a teacher wants to prepare a training package on shop layout, a subject area which falls under the broad subject head of Retail Management the main objective could be stated as "Increasing Sales" and the training in floor management will lead to better sales. Within this broad aim the terminal objective could be identified in the context of the skills that is expected to be achieved by the participants in order to increase sales. In other words it refers to the specific task which the participant will be able to perform on the completion of the training. Thus the terminal objective of the training package on shop layout could be identified as follows:

On the completion of the training the participants will be able to do the following:

i) manage the floor area of scientific lines so that the sale, will increase,

ii) manage the floor area in such a way that customers could feel that shopping is a pleasure,

iii) manage the floor area into self service area and counter sale in such a way that best use of the space is made by placing proper commodity at proper place, etc.

The distinction therefore, between the main aim and terminal objective is that while the farmer refers to achieve broad management objective the latter aims at giving specific skills and knowledge in order to achieve the main aim.

In the preparation of the training package a very careful exercise is required to identify terminal objective. It is mainly on the basis of the terminal objectives that the whole lesson plan is to be developed on 'Modular' concept.

Given below is another example in respect of Aims and Terminal Objectives.

Subject of Training: Course in Training Methodology and Techniques.

Aims : To improve the training. To give participants command on effective training. To enable the teachers to develop and produce their own training materials.

Terminal Objectives: At the conclusion of the programme the participants will be able to do the following:

a) The participants will be able to understand and use modern teaching techniques such as case study, role play, training package, etc.

b) The participants could use the various audio-visual equipments to make the training effective.

c) The participants will be able to produce and use their own training package to make the training effective.

Time Factor : Time factor is very important in the preparation of training package. The duration of the programme has its bearing on either enlarging the area of terminal objective or reducing it. Therefore, before the task of preparing the training package is undertaken the teacher should take into consideration the time available for dealing with the subject or topics or a given lesson within a topic. The terminal objectives then have to be adjusted so as it could be covered within the stipulated time as provided in the syllabus.

Project Formal : In order to have better planning in the preparation of the training package the teacher could adopt the project formal approach. A project format in short is nothing but a written statement of plan of action. An example of the project format is given as Annex-A.

A careful look at the Project Format will reveal that it requires a lot of imagination and complete advance planning which could serve as a guide to the teacher in preparing the training package.

Collection of Materials

Collection of materials is an important step for the preparation of an effective training package. Once the terminal objectives are identified, the teacher must attempt to collect the relevant materials which could help in achieving both the Aims and the terminal objectives of the training package.

There is no cut and dried formula to offer to the producers of training package for the best or most suitable way of collecting materials. Much depends on the resources available, the objectives or uses to be made of the training package and the information needs of the producer. A variety of strategies are being employed to secure information by the teachers. These methods may take the form of observation, case study references from libraries, personal interviews with the subject matter specialists etc.

Whatever method or technique the teacher may employ for collection of information, he must consciously apply some tools of systematizing and recording of the data. He may use small cards or note books on which to write key words with photographs, maps, scales, etc. as supplementary materials. He may also utilize a note log with a set of sub headings dealing with different items of the subject. Whether or not the original notes are recorded under sub headings, they must be reanalyzed and placed under the appropriate categories. Such categorization will facilitate the shifting and sequencing of materials for script writing.

TRAINING PACKAGE - PROJECT FORMAT

1. Name of the Project ______________________

____

2. Media ______________________________________

3. Language ______________________

4. P Producers of the Package ______ Coordinator ______

____

5. Target Population ______________________

____

6. Age Group ______________________

7. Ability ______________________

8. Other relevant factors ______________________

____

9. Main Aim of the Package ______________________

____

10. Terminal Objectives
    a.
    b.
    c.
    d.

11. Attached documents
    a. script of the lesson
    b. teacher's notes
    c. student's notes

12. Reasons for choice of the media ______________________

____
Name of the Teacher preparing
the Training Package

Date: ______________________

CHAPTER IV: CHOICE OF MEDIA AND VISUALIZATION

The most critical stage in the production of a training package is the choice of media and visualization. The teacher has a wealth of informations and materials available with him but he faces problems in putting these ideas and knowledge across to his audience. As has been pointed out earlier, the technique of Training Package helps the teacher in communicating his knowledge more effectively with the help of suitable audio-visual aids. However, the major problem in respect of the use of the audio-visual aids is the right choice of media to make the communication effective. Should he communicate his ideas through the flannel graph or via the magnetic board or through the use of slides? If the use of overhead transparencies could be more effective than all other aids? It is in this context that the teacher has to analyze carefully the various factors which should be taken into consideration in making a choice of the communication media.

Choice of Media

The question of selecting a proper media comes at a stage when the teacher has prepared all the material for the different sub-unit modules of a given topic. In the choice of media he should take the following aspects into consideration:

1. The capacity of the teacher in producing audio-visual materials and skills in handling audio-visual equipments. The teacher must look to his own capability in converting the materials into visuals. If he could himself draw simple figures? If not, could he get his ideas converted into visuals through the help of an artist? Can he handle audio-visual equipments? He must be in a position to distinguish the effectiveness of the one equipment media over the other.

2. Receptivity (Level of understanding) of the audience: The choice of media is again greatly affected by the level of understanding of the target population.

3. Subject matter: The subject matter of teaching itself affects the choice of media to a large extent. If it contains more figures, forms, schedules then probably the choice of overhead projector could be appropriate. Similarly, if the subject matter deals with the principles of display in retailing, the best choice could be the use of slides with the help of slide projector.

Apart from these there are many material and practical factors which should be taken into consideration before the choice of media is made some of these prominent factors are identified below:

i. Facilities available to the teacher to produce audio-visual materials such as, graphic room, equipment, photographic equipments, projection facilities, recording facilities, etc.

ii. Another important material factor is the availability of finance and institutional support for production of material including the support in terms of personnel, transportation, etc.

iii. The teacher must also look to the environment in which he is ultimately going to use the material. If he is going to use the material in class room situation or in open air. If the material is to be used outside the class room as we find in case of member education the choice of media will get confined to few items.

iv. Other important factor for consideration which has a bearing on the choice of media is the availability of production material. A teacher must select only such media for the use of which the material is available. For example, a teacher may decide to use coloured slides with the help of slide projector, but coloured slide films or the required processing facilities may not be available in the country.

v. The physical facility available in the class room must also be considered before making the choice of media. Is the room sufficiently convenient to use the aid that the teacher has in mind? Can the room be easily darkened? Is ventillation good? Is the electric supply available? etc.

vi. One of the important precaution that a teacher must take is to avoid the multiplicity of media for treating a particular subject. Apart from creating operational problem for the teacher, it may reduce the effectiveness of the techniques. Experiences have shown that a teacher at most should use not more than two medias during a session.

Consultation with the audio-visual experts

A teacher who decides to use the technique of training package based on audio-visual aids may not necessarily be an expert in the use of audio-visual aids. In such a situation once the material or ideas to be visualized are ready, he should consult an audio-visual expert. The expert can solve many of the problems that a teacher faces in giving concrete shape to his visual ideas. In order to take the best out of him, the following steps may be taken:

a) The teacher should consult the audio-visual expert with his full script and hold a fairly frank and serious discussion. The best way is to leave the script with him and give him some time to go through the material and then agree on a specific time and duration for holding consultations with him. In order to get the optimum benefit from the expertise available with the expert it is essential that the teacher should give his own view points with regard to the manner in which the teacher wants to present the subject in the visual form the teachers should ensure that the expert has, clearly got the point. This will help the audio-visual expert in exactly converting the ideas of the teacher into visuals.

b) Once the visualization part of the material is ready the teacher should take necessary steps to synchronize the visual materials with the written script.

c) After the first attempt is accomplished, the teacher may request the audio visual expert and his team to review the material and the teacher could undertake the corrections wherever necessary.

Preparation of Sequence Sheets

What is a sequence sheet? It is a sheet of paper containing three principal parts (a) subject heading including the page number, (b) one half ... the left side contains black squares for visualization, and (c) the right half part contains horizontal lines meant for written script of the subject matter. An example of the sequence sheet is given as Annex-B.

As has been pointed out in Chapter-II a training pack deals with one subject, and the subject is divided into various modules (or elements) and each module into various sub-modules. Each sub-module is connected with the other sub-modules and the subject is handled in stages. It is the treatment of the subject step by step and the SEQUENCE SHEET is the basic instrument in breaking down the subject logically and effectively.

The box (or the sequence) contains the rough visual which is synchronized with the narration and the script dealing with the subject. The written narration is the job of the teacher himself. He can visualize his narration in a very rough manner in the squares provided. These squares are used in order to present the visual in proper sequence.

Visualization

In visualization the following factors may be considered:

a) The visualization depends upon the script and the subject under discussion. The teacher should, therefore, first prepare a rough scheme of visualization.

b) Always prefer simple figures to complicated and detailed figures.

c) The pictorial figures and forms of symbols planned to be used should be of national characteristic.

d) The words and numerical figures are to be of broad and bold type so that they are seen from a distance.

e) Initially very rough drawings are to be prepared by the teacher himself (preferably in pencil). These are to be suggestive in character.

The final visualization should be attempted after having consultations with the expert who may suggest modifications. This is particularly necessary in such cases where the teacher does not have the background in the use of audio-visual media.

Annex-B

EXAMPLE OF A SEQUENCE SHEET

Subject: Channels of Marketing		: Page No. 7
Presentation :	10 minutes	:
Discussion :	5 minutes	: Unit No. III

S. No.	Suggested Visuals	Verval/narration
6	SLIDE showing the shop of a private trader	The Teacher has to give the private trader's characteristics as the following 1. buys at lowest price 2. farmer has to carry goods to him and waste his time and money 3. private trader does not pay cash price immediately 4. He only buys best quality goods.
7	POSTER Exchanging expensive farm produce with cheap consumer commodity (plastic bucket)	Secondly, the barter system should be explained. Points to be stressed: 1. Low price for farm produce 2. Wastage of time and money for transport.
8	SLIDE showing a Government Collection Centre	Thirdly, the extension worker explains the functioning of the Government Marketing Department and gives its defects. 1. Corruption and indifference 2. They sometimes buy from middlemen 3. Farmers have to carry their produce to collection centre 4. Low and fixed price for farm produce

CHAPTER - V: FIELD TESTING AND VALIDATION

Objectives of Field Testing

Field testing is an important instrument for the teacher to judge the reliability and suitability of a given teaching material prepared by him. This is also true in the case of the field testing of Training Package. The objectives of field testing could broadly be classified as follows:

i. to test the validity of the material with references to objectives,
ii. to examine the effectiveness of the material in the sequential order and in terms of the contents concerned,
iii. to examine the effectiveness of various types of audio-visual aids used in the communication process, and
iv. to improve the teachers performance in the light of the feedback received.

Field test provide an opportunity to make suitable improvement (and adaptation of the material) from the point of view of effective teaching.

Techniques of Field Testing

There are various techniques which could be adopted for field testing. However, the selection of a given technique for field testing will depend on the type of teaching material which is required to be tested.

The field testing techniques could broadly be classified into two types.

A. Classroom testing
B. Close door testing

The basic considerations for field testing relate to the target group and target situation.

Before we actually discuss the two techniques, we could briefly discuss the points i.e. the target population for testing and the target situation for testing.

The selection of the target population should be in accordance with the learning objectives. For example, if one wants to test the teaching/training package on shop layout, the target audience for field testing should be drawn from among those people who are actually connected with the question of shop floor management. There is no point in testing such material among salesmen/sales supervisors or among the managers of banking or credit organizations the target audience must belong to the specified sector for whom the material is intended to be used subsequently.

Similarly, in the field testing which aims at verifying certain facts the test should be conducted in real life situation.

A. Classroom testing technique

The essense of this technique is to expose the training package before a selected target population in a class room situation at least two to three times. The main requirements for the use of such a technique is:

i. necessary physical facilities
ii. necessary equipment and materials used in the package
iii. adequate time.

Methods

i. Use Participative Technique: It is often found that the audio-visual technique becomes a one way traffic, if it is not used intelligently by the teacher, as a result of which most of the effectiveness of the audio-visual technique is lost. In a test situation it is absolutely necessary to involve the target population in the learning situation but at the same time avoiding unnecessary discussions leading to wastage of time.

ii. Identify areas of tests: Before the field test is conducted by the teacher it is essential that he should broadly identify the areas which he wants to test. He should make a note of such identified areas and try to focus the discussion on these areas. This does not mean that the areas which the teacher has not identified should not be open for receiving comments. The test areas may cover the following aspects in a training package:- (a) testing of subject matter - its coverage - contents and concepts used, (b) testing of the script, (c) testing of the sequence order as followed in the package to deal with the topic, (d) testing of the effectiveness of the visuals used, and (e) testing of the effectiveness of media used.

iii. Testing of Visual Aids: While using the visual aids under test situation the following aspects be taken into consideration: (a) the suitability of the visuals used in relation to the symbols and subject matter, (b) visibility of the visuals used, (c) utility of the visuals used and scope for replacing one visual method by the other, and (d) operational problems in the use of visuals. The teacher should identify the difficulties that he may face in the handling of the visuals.

iv. Recording of Test Results: It has often been observed that even under the participative technique of training the only method of finding out the test results used by the teacher is the "evaluation form" which covers the subject matter very widely. In this process the teacher misses many vital points brought out during discussions.

The system of test notes by the teacher could form an important informative material to improve the product. Some teachers are found using the blackboards to note down the various points emerging during the discussions. But these are erased by the teacher himself with the continuation of the discussion. For this purpose the teacher could profitably use the flip chart board with the help of a marker noting down the main points of discussion and the broader areas of consensus which the teacher could refer subsequently.

v. Use of Evaluation Form: At the end of the course the teacher should give a questionnaire to the target audience in order to know their reaction broadly on the following aspects: (a) Adequacy of contents covered in the package, (b) Receptivity regarding the knowledge imparted, (c) Presentation of subject matter, (d) Use of visuals in terms of time/clarity of understanding, etc., and (e) General suggestions.

After the evaluation forms are received by the teacher he should compile the data and analyze them. The test notes in the form of the flip chart sheets should also be examined and analyzed by him after which he could prepare a comprehensive note making use of both 'test notes' and evaluation report.

The observations as received by the teacher should be analyzed by him objectively and necessary modification carried out in the package at appropriate places. These suggestions could also be discussed with experts before modification wherever considered appropriate. A specimen of evaluation form on shop layout and display is attached as Annex C, at the end of this chapter which should be taken as suggestive. Each teacher may evolve his own evaluation form according to his needs of training.

Re-Testing:

In order to ensure qualitative production it may be necessary to expose the revised training package for re-testing before the appropriate target audience to examine the effectiveness of the material. The whole process discussed earlier could be followed for re-testing.

B. Close door Testing

Close door testing refers to a test situation wherein the training package is shown to a selected group of audience. The select group may belong to three categories of personnel i.e. the subject matter specialists and management personnel in the field and the audio-visual expert. The basic difference between the class room testing and close door testing is that in the former case the material is used as a teaching material where as in the second case the material is used as demonstration material. In the second method the material is thrown open for discussion whenever the experts want to comment and discuss. The teacher makes simultaneous noting of the comments. It is not necessary to have further evaluation after the demonstration and discussions are over.

The teacher should incorporate the points emerging from the discussion during the process of modification of the package.

The next step involved in the close door testing is to again expose the material before the selected expert and to see the effect of the changes made. After this the material could be ready for use. However, it would be more appropriate if a combination of the two methods is made to derive further benefit from such an exercise. Time permitting it may be appropriate for the teacher first to conduct close door testing, carry out the suggestions and then test the same in the class room situation. After this the teacher may take necessary steps to give final shape to the package.

Modification and Finalization of the Training Package

Planning Modification:

Identify and classify areas of modification into:

i. modification of the script,
ii. modification of the contents and concepts,
iii. modification of the sequences,
iv. modification of the visuals, and
v. modification in the use of media.

Time and Cost Factor in Modification

Modification of the training package not only involves considerable time but it may also involve considerable amount of money. The first three areas under the head planning modification of the training package are exclusively related with teacher's efforts and normal secretarial assistance available to him. These could be carried out by the teacher by phasing his busy time schedule. The main objective in such modification should be to make the subject matter move effective by its logical presentation.

As for the cost factor in modification is concerned it is suggested that the teacher before carrying out modifications involving costs (particularly in relation to Sr. No. iv & v under the head planning modification) should appreciate the physical and financial constraints under which he is functioning. This is extremely essential if he is planning to modify the media used for visuals. Such changes may involve a lot of cost. It is always advisable to consult audio-visual experts before a modification is attempted in the visual.

Draft Modified Package:

A draft modified package containing all the changes both in the text of the package as well as the visuals be discussed with the experts. The visuals to be modified may be only illustrative in nature providing scope for futher refinement. After consultation with the experts the modifications may be given final shape in the package.

Annex-C

A Specimen of Evaluation Form on Training Package on Shop Layout & Display

(Please give your frank and free opinion. Do not leave any column blank)

Name of the Respondent

Designation

Organization

A. Content:

i) Have you understood the various concepts and principles to to be followed regarding the shop layout?

Yes/No

Remarks:

ii) Can you now study the layout of a store and give suggestions for improvement?

iii) What is your overall reaction to the subject matter covered in the lesson on Shop Layout?

B. Teaching Techniques

i) Do you consider the media/used as effective?

ii) Do you consider that the use of visual aids reinforced your understanding of the concepts involved with the subject?

Yes/No

Remarks:

iii) Have you any suggestions to offer in respect of the use of medias to make learning more effective?

Yes/No

Remarks

iv) Do you think the same purpose could be achieved without audio-visual aids?

Yes/No

Remarks

v) Do you consider this a method of saving time in the class or more consuming?

Yes/No

Remarks

vi) Do you feel that you were involved in the learning process?

Yes/No

Remarks

C. General Remarks & Suggestions

CHAPTER VI: HOW TO USE A TRAINING PACKAGE

The training package contains a number of modules (or unit packs) and a complete text of the manuscript of the training package, project format and evaluation sheet. It would be worthwhile at this stage to observe the steps that should be followed in its usage by the teacher in a given teaching situation. This would make the task of the teacher much easier - specially in a situation where the teacher using the training package is not the producer of the training package.

Guidelines for the Use of Training Package

For the convenience of the teacher the guidelines for the use of training package is divided into the following categories:

a) Preparation before coming to the class room;
b) Class room arrangements including equipments required for the use of training package;
c) Precautions while teaching;
d) Handouts; and
e) Use of feedback information.

a) Preparations before coming to class

i) The teacher should be thorough with the subject matter for which the training package is prepared;
ii) The teacher must go through the script very carefully and do further reading on the subject matter if necessary;
iii) The teacher should prepare his own notes (apart from the script that is available) to facilitate him to use the training package.
iv) If the teacher is using the slides during presentation of the training package, he should see that they are placed in the slide tray/cabin in sequential order in advance. It is also advisable to preview them before using them in the class room. Similarly, if the teacher is using over-head transparencies, he must arrange his transparencies in the sequential order given them serial numbers.
v) The teacher should likewise check before hand whether the other relevant teaching materials are arranged in accordance with the script.

b) Class room arrangement

i) It has been pointed out at many places that the training package makes intensive use of the audio-visual aids and media. It is, therefore, essential that the teacher should see that the audio-visual equipments which are to be used during the use of training package are not only available but are available in working condition. The placement of the equipments should also be examined by the teacher.
ii) If the teacher is using the training package in a teaching situation for the first time, it is advisable for him to rehearse it before hand.
iii) The teacher should ensure the proper sitting arrangement and lighting arrangement to make the use of audio-visual aids more effective.

c) Precautions while teaching through training package

i) The first precaution that the teacher should take is in respect of meeting the needs of slow and fast learner. Since the technique of training package heavily depends on the use of audio-visual aids the teacher while handling the audio-visual aids must look to the needs of slow learner also. It is, therefore, advisable that the teacher should not handle the aids fast.

ii) The teacher should speak less and allow the visuals to speak.

iii) The teacher should use participative teaching technique. In no way the teacher should be a one way communicator when the lesson is in progress. He should give the opportunity to the participants to raise questions and clarify any matter that arise during the deliberation of the lesson. In a situation where the students are silent observers the teacher should arouse their interest by asking questions and involving them in the subject matter.

iv) Be a good listener. The participants raising any issue be given sufficient opportunity to clear their mind.

v) During the progress of the lesson, the teacher should summarize the issues covered from time to time and invite comments. There should be final summarization of the learning objectives at the end of the lesson.

vi) The teacher should not be hasty in completing the lesson and provide opportunity to the participants to take down notes wherever they feel necessary.

vii) When the teacher has to use one or more visual aids simultaneously he should ensure that they are arranged in such a way as to avoid any over lapping.

d) Handouts

After the presentation of the training package if the teacher packs up all his material and leaves the class without leaving any notes or handouts for the students, he is not likely to achieve fully his teaching objectives. It is, therefore, necessary that a teacher should prepare in advance a short synopsis of his lesson in the form of handout and distribute the same after the lesson is over. This will enable the participants to refresh their memories on the subject.

e) Feed-back information

In the interest of improving the training package the teacher should obtain specific feed back information on the package. This he should do in addition to the feed back that a teacher may receive during the progress of the session. A specimen copy of the feed back information that may be required to improve the effectiveness of the training package is enclosed at the end of Chapter IV.

CHAPTER VII: SUMMARY OF STEPS TO FOLLOW IN THE CONSTRUCTION OF A TRAINING PACKAGE

By making use of a training package in education and training programmes the teacher is going to make his own task as well as the task of the learners easy. Given below are the summary of steps to be followed in the preparation of a Training Package:

1. Select the subject - it can be a broad subject, not necessarily a precise one.
2. Identify the target population for which you are going to design the training package. All training packs cannot be effectively applied to all types of people.
3. Set the MAIN AIM of the training package. This has to be defined as concisely as possible. There should not be too many of ideas and themes in the MAIN AIM.
4. Define the OBJECTIVES that you wish to achieve after the application of the training package. These should be the terminal objectives. Make use of the project format.
5. Be aware of the availability of material.
6. Select the right type of media and take into consideration its availability. The media should be related to the general level of understanding of the target population. Do not make it too sophisticated.
7. Collect suitable information from various sources. It would be necessary for your to make trips to farmers, their fields, meetings with experts, consulting of standard documents and obtaining of information from well-established resource centres.
8. Plan or organize the instructional material. Make use of a lesson plan and prepare your teaching notes. The instructional material should be in a sequence.
9. Produce the rough visuals on the Sequence Sheet.
10. Synchronize the audio part with visual images (if slide-cum-tape-synchronization is to be used).
11. Prepare teachers notes and students notes.
12. Prepare evaluation sheets and keep enough copies ready.
13. Pre-test the training package with limited audience.
14. Incorporate changes and standardize the training pack for use.

....

ldg/
10/7/80

THIS IS THE STORY OF "A MISTAKEN GIFT"

A man thought of purchasing a gift for his sweetheart. After much deliberation, he finally decided on a pair of gloves. He was accompanied by his sister to a ladies' shop to make the purchase. His sister bought a pair of panties for herself while he bought a pair of gloves for his sweetheart.

The package got mixed up while it was being wrapped at the store, that his sister got the gloves and he got the other package which was the panties. He sent the package to his sweetheart with a letter he wrote which read as follows:

Dear Sweetheart,

This is to remind you that I'm keeping track of your birthday. I choose this gift to replace the one I tore the first time I was with you because from time to time I met you, you have not been in the habit of wearing one when we got out in the evening.

If it had not been for my sister, I would have bought you the long ones with buttons, but she said everybody is wearing the short ones. They are of very delicate colors. The saleslady I bought from showed me a pair she had been wearing for three months and have not been soiled at all. She said they had not been washed for three months.

I wish I could put them on you myself. But no doubt many other gentlemen's hand will come in contact with them before I have the chance to see them again. Anyway, I hope you will think of everything the moment you put it on.

I had the saleslady put them on herself for size, and the looked very nice on her. I did not know the exact size, but I thought it would be more capable than any one else. They will naturally be a little deep for wear and sometimes have the tendency to smell, so sift a little Talcum powder into them before wearing.

I almost envy them as they cover a part of your body which I so love to held and squeeze. Be sure to keep them on while cleaning, as they are liable to shrink. I hope you will accept them with the thought that I gave them to you and be sure to wear them next Friday evening so that I may have the pleasure of removing them!

With love and kisses,

NOJA BEN ABOU

P.S.

I'm looking for the time I will kiss the back as well as the front. The saleslady said that the latest style is unbuttoned and hanging. This gives them the careless style. If they are too small, send them back to me and I'll stretch them by putting them on myself. Don't forget to put my favorite scent.

Same

THE EMOTIONALLY MATURE PERSON

1. Is able to tolerate the normal stresses of everyday living without undue tension.

2. Is able to handle anger and irritation in a socially acceptable manner.

3. Is able to accept authority when necessary.

4. Has a belief or philosophy of life which helps to stabilize his moods and gives him a measure of inner peace.

5. Exercises sold control and self restraint.

6. Exercises good judgment.

7. Has a capacity for a deep and actually satisfying love relationship.

8. Is contunally growing in knowledge and understanding, and has an open attitude toward new learning.

9. Has an ability to think, reason, and evaluate new ideas.

10. Is responsible, rather than irresponsible.

11. Is not self-centered, but is aware of and concerned with the feeling of others.

12. Is able to communicate effectively.

13. Feels secure emotionally.

14. Possesses social poise.

SCORING: Each of the 14 statements bears on one of the 14 factors which make up emotional maturity. Give yourself 7 points for each "A"; 3 points for "C"; no points for each "B".

80 to 100 may be regarded as an excellent emotional maturity rating; 60 to 80 is very good; 40 to 60 is fair or average. A score of under 40 indicates that you should take stock of yourself and concentrate on cultivating these qualities which are necessary for emotional maturity. You can find out exactly what these qualities are by going over the test and checking you "B" answers.

GROUP DYNAMICS EXERCISES

WHO AM I? A COCKTAIL MIX

Goal

To allow participants to become acquainted quickly in a realtively non-threatening way.

Group Size

At least ten participants.

Time Required

Approximately thirty minutes.

Materials Utilized

1. One 8½ by 11-inch sheet of paper with the question "Who am I?" written in one-inch letters at the top for each participant.

2. Pencil and straight pin for each participant.

Physical Setting

Large room in which participants may move freely.

Process

1. Participants receive the materials and are allowed ten minutes in which to write five key dimensions about themselves. The facilitator should stress legibility as participants must be able to read these dimensions in order to become acquainted with other participants.

2. The completed sheets are pinned to the front of each participants.

3. As soft music plays in the background, the participants circulate in a cocktail party fashion but without speaking.

4. The facilitator asks participants to move on to another person every two minutes for five to eight "meetings."

5. After this nonverbal phase, the participants are told to return to two or three different people they thought would be interesting, based on their previous encounter. They may now speak to each other. They may be encouraged to ask questions which they ordinarily would not ask.

WCD/PTD/jpa
10/28/80

JOHARI WINDOW: AN EXERCISE IN SELF-DISCLOSURE

Goals

1. To introduce the concept of the Johari Window.

2. To permit participants to study the data about themselves in terms of the concept.

Group Size

Eight to twelve. Several groups may be directed simultaneously.

Time Required

Approximately two hours.

Materials Utilized

1. Chalkboard

2. Self-knowledge and Tally Sheet

3. Group Participant Feedback Form

4. Pencils

Physical Setting

Circle of chairs.

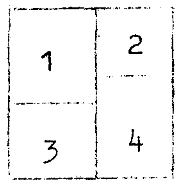
Process

1. The facilitator presents a lecturette on the Johari Window concept. (The name Johari honors the originators, Joe Luft and Harry Ingham.) Display the chart on the chalkboard and discuss the four types of data.

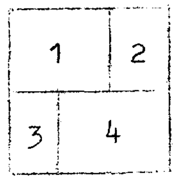
Known to others	I. Area of free activity (Public self)	II. Blind area ("bad breath" area)
Not known to others	III. Avoided or hidden area (private self)	IV. Area of Unknown activity

GROUP DYNAMICS EXERCISES

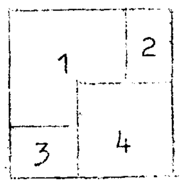
Under conditions of self-disclosure:



Under conditions of feedback:



Under conditions of self-disclosure and feedback



2. Participants complete the self-disclosure sheet.

3. Participants fill out the Group Member Feedback Form.

4. The facilitator collects the feedback forms and reads them out anonymously. Participants tally perceptions held of them on the Self-Knowledge and Tally Sheet, which they keep. This provides data on Area II, the blind area, and permits the group participant to test whether he has actually revealed any hidden data about himself earlier in the group. Area IV represents assets and liabilities unknown to all.

5. The group has a discussion of the personal meaning of the Johari Window.

WCD/PTD/jpa
10-28-80

Name ______________________

Age ____ Date __________19__

LOST ON THE MOON

A TEST

Your spaceship has just crash landed on the moon. You were scheduled to rendevous with a mother ship 200 miles away on the lighted surface of the moon, but the rough landing has ruined your ship and destroyed all the equipment on board, except for the 15 items listed below.

Your crew's survival depends on reaching the mother ship, so you must choose the most critical items available for the 200-mile trip. Your task is to rank the 15 items in terms of their importance for survival. Place number one by the most important item, number 2, by the second most important, and so on through number 15, the least important.

________________ Box of matches

________________ Food concentrate

________________ Fifty feet of nylon rope

________________ parachute silk

________________ Solar-powered protable heating unit

________________ Two .45-caliber pistols

________________ One case of dehydrated milk

________________ Two 100-pound tanks of oxygen

________________ Stellar map (of the moon's constellation)

________________ Self-inflating life raft

________________ Magnetic compass

________________ Five gallons of water

________________ Signal flares

________________ First-aid kit containing injection needles

________________ Solar-powered FM receiver-transmitter

WCD/PTD/jpa
10-28-80

LOST ON THE MOON
(Answers)

Items	NASA's Reasoning	NASA's Ranks	Your Ranks	Error Points	Group Ranks	Error Points
Box of Matches	No oxygen on moon to sustain flame; virtually worthless	15				
Food Concentrate	Efficient means of supplying energy requirements	4				
Fifty feet of nylon rope	Useful in scaling cliffs tying injure together	6				
Parachute silk	Protection from sun's rays	8				
Solar-powered protable Heating unit	Not needed unless on dark side	13				
Two .45 caliber pistols	Possible means of self-propulsion	11				
One case of dehydrated Pet Mild	Bulkier duplication of food concentrate	12				
Two 100-pound tanks oxygen	Most pressing survival need	1				
Stellar map (of the moon's constellation	Primary means of navigation	3				
Self-inflating life raft	002 bottle in military raft may be used for propulsion	9				
Magnetic compass	Magnetic field on moon is not polarized-worthless for navigation	14				
Five gallon of water	Replacement of tremendous liquid on lighted side	2				
Signal flares	Distress signal when mother ship is sighted	10				
First aid kit containing injection needles	Needless for vitamins, medicine, etc. will fit special aperture in NASA space suits	7				
Solar-powered FM receiver-transmitter	For communication with mother ship but FM requires line-of-sight transmission and short ranges!	5				

Total ________ ________

Error points are the absolute
Differences between your ranks
NASA's (disregard plus or minus signs).

Scoring for individuals:
0-25 - excellent
26-32 - good
33-45 - average
46-55 - fair
56-70 - poor
71-112- very poor, suggests possible faking or use of earth-bound logic.

TEST YOUR SKIN PERSONALITY

Fill the blanks with A, B, C or D:

________ 1. People who stnad very close to talk to me are, in my opinion, (a) sexually frustrated, (b) showing lack of respect, (c) terrifying, (d) perhaps hard of hearing or short-sighted.

________ 2. Seeing people throw up their arms and open their mouth and eyes side makes me think (a) they are showing off, (b) they have nothing better to do with their time, (c) they may be in pain and should be pitied, (d) they are expressing pleasure and happy surprise.

________ 3. Any resemblance I have to animals is through (a) the dreadful way other people treat me, (b) my ability to act swiftly and single-mindedly, (c) the things people say about my appearance, like "you're a handsome beast" or "you're a timid mouse" or "hat a mane you've got there" (d) my ability to feel so much at case with everyone.

________ 4. When I walk past place-glass shop windows, I (a) avoid looking at myself, (b) take the opportunity to check my appearance, (c) hope that nobody notices me looking at myself (d) concentrate on what's inside.

________ 5. Attending a meeting of my club or union, I would sit (a) in the back row on the side, (b) in the front row in the middle, (c) well down the back about the middle of the row, (d) anywhere at all.

________ 6. When somebody says they have a very "close" family, I take it to mean, (a) their house is too small for them all, (b) the children are allowed too many liberties, (c) they cry on each other's shoulders whenever anything goes wrong, (d) they show a lot of love and attentice and share everything.

________ 7. If I saw a person of the opposite sex walking naked down the street I'd (a) turn and go the other way, (b) call the police, (c) offer him a coat or something, (d) ask him what show he is advertising.

________ 8. In the crazy event of all my clothes disappearing as I walked down the street, then I would (a) blame the government and run for cover, (b) got into someone's car, (d) burst into tears, (d) start to sing.

________ 9. One of the things that makes me feel an immediate dislike for some people is when (a) they put their hand on my body, (b) they take it for granted they can walk straight into my house or office; and touch me or slap me on the back, (c) they make a rude gesture, (d) they put the wrong meaning on a friendly gesture.

________ 10. I feel physically attracted to people if (a) they have plenty of money, (b) they admire my body, (c) they tell me they need me, (d) I know they need me.

________ 11. As a guest at a party, I usually (a) stay on the side-lines and leave early, (b) spend a lot of time beside the host or hostess, (c) move around passing savouries, (d) enjoy myself and find people moving towards me.

________ 12. If a salesman came to my door with a product I did not want, I would (a) let him talk, stare him out then close the door, (b) slam the door in his face, (c) stand half-way behind the door and let him talk, (d) go outside and examine the product.

________ 13. Face-toface, "crushed" against an attractive stranger of the opposite sex in a bus or train I would (a) turn my head so he could not breathe on me, (b) give him a dirty look as he would turn his head, (c) smile apologetically then avert my eyes, (d) stay face to face and enjoy it.

________ 14. In my opinion, the father of a very young baby should (a) not hold it for at least three weeks, (b) give it a bottle only if the mother is ill or late home from the shop, (c) give it a bottle often, but not change happies in case he drops the baby, (d) cuddle it, talk to it, play with it, take it for a walk and to the baby health clinic.

________ 15. The right places to demonstrate your emotions are (a) weddings and funerals, (b) bedrooms, (c) in the country surrounded by nature, (d) almost anywhere, providing you have finished your work.

________ 16. Football players often throw their arms around each other and embrace after scoring a goal. I think they are (a) making fools of themselves, (b) putting their masculinity in doubt, (c) showing they are genuinely pleased with the man who scored, (d) being "rewarded" - just like a mother hugs a small boy when he has been good.

________ 17. In an ordinary converstion, I find (a) I do not look at the other person's eyes very much and find it easier to look at other things in the room, (b) the other person always seems to look away from my eyes, (c) I look into his eyes but then get stuck for words, (d) I am not aware of any difficulties whatever when it comes to looking.

________ 18. If somebody I do not know very well touches my hand in conversation, my reaction is to (a) withdraw it quickly, (b) shove his hand away, (c) wait for him to take his ahdn away, (d) consider it perfectly natural.

________ 19. Confronted by a friend or workmate who has just received some bad news, I would (a) look at the floor and fidgot, (b) send for a taxi or doctor, (c) put my arm around his shoulder for a minute, (d) take him by the arm or hand and sit with him somewhere quiet while he recovered.

________ 20. When it comes to displays of affection between the sexes in public, I would set my limits at (a) a quick "pack" on the check, (b) a handshake, for both sexes, (c) whatever the other person thought was right, (d) a warm hug and a kiss on the mouth.

WCD/PTD/jpa
10/28/80

Test Your Skin Personality
(HOW TO SCORE)

(a) - 5 points
(b) - 10 points
(c) - 15 points
(d) - 20 points

Add up your total points.

350-400. You are a warm and strong-willed person whom others call an extrovert. You are outgoing, and do things with gusto that often alarms your friends and relatives. They figure that a few more inhibitions would do you no harm.

Because of your drive and enthusiasm and your friendly approach, you achieve most of your aims and do not hurt anyone in the effort. (You might tend to bore a few on rare occasions).

You are a positive and dominant person.

300-349. You are not usually afraid to express your emotions and while this sometimes frightens a few people around you, your general warmth and kindliness, and ability to take the lead, keeps the tide in your favor.

You tend to worry a bit about your actions later.

250-299. Your bark is usually louder than your bite, when you consider that you are so eager to forgive and forget.

This, of course, is not a bad trait in many cases. But you are so willing to please and so generous with your judgments and your emotions that you are likely to leave yourself in a position where other less scrupulous people will "use" you.

Sometimes you are very submissive.

200-249. You may still be unsure of how you want to act out your life, and tend to experiment with your attitudes. Sometimes those depend on your physical condition of the moment - your tiredness or your need for a good meal - and sometimes on the people near you.

Others may say you "blow hot and cold." If you are teenage to mid-twenties, this is not unusual. After that, it is more comfortable for everyone concerned to start making some firm decisions.

150-199. Your popularity is pretty shaky at times because of your cold, sometimes aggressive attitude to others. Associates may think you have not much time for them, and seem to drift away in case you have any plans of riding "roughshod" over them.

You cannot affort to lose your sense of humor because once that goes you will not be able to laugh at yourself - and in your case this is important. Otherwise you might get carried away with your own "toughness" and lose a lot of your influence.

Putting it generally, you are in the strong-but-cold category.

100-149. You tend to feel that getting involved with others will be uncomfortable. Sometimes you fear you will not be able to keep up with them, either in the career rat-race or socially.

You find you need people around you more as "props" than as friends or colleagues with whom you can exchange ideas. In this case, you would have to be careful not to become a continual "taker", draining others of their enthusiasm to stay around.

Below 100. You are by no means an optimist. You tend to "go back into your shell" and show signs of bitterness - maybe you expect things to go wrong for other people, and are even glad when they do.

Perhaps what you show outwardly could be a cover-up for a state of oversensitivity and inner fears.

CONFLICT/COLLABORATION

Intergroup Exercise
Instructions

Objectives and Task

1. This exercise involves two teams each trying to win as much money from each other and/or the "Bank" as possible.

2. Each team has 20 weapons represented by 20 tanks. When a team has a weapon in an "active" state, the tank is turned with its marked side up. When the weapon is "inactive", the marked side of the tank is face down. Each team begins the game with all 20 tanks in an "active" (marked side up).

3. A total game consists of one "set". A "set" consists of ten "moves". During each move a team may change two, one, or zero weapons from an "active" (marked) position to an "inactive" (unmarked) position, or vice versa. At least two "sets" are planned for the exericse.

4. A team has two minutes to make each move. If the team fails to decide on a move within that time, no tanks will be turned. Referees will signal when moves are to begin and end.

5. At the end of each move, a team may but need not decide to do either of the following:

   a) "Attack" the other team. An "attack" always takes precedence over negotiations. When an "attack" is called the "set" automatically ends.

   b) Negotiate with the other team. For this purpose each team should appoint two (2) negotiators, who may be changed at any point during the "set". There will be forced negotiations after the Third, Sixth, and Ninth moves. A team may also request negotiations at the end of any other move. The request may be either accepted or rejected by the other team. Negotiations take place on neutral territories and this lasts no longer than 3 minutes. Negotiators may or may not bargain in good faith. Teams are not bound by agreements made by their negotiators.

6. A "set" will end if any of the following events take place:

   a) A team "attacks" the other team.

   b) When neither team is "attacked" the "set" is automatically ended at the end of the Tenth move.

7. At the end of a "set" the following pay-offs will govern:

   a) The team with the greater number of "active" weapons will win ₱1.00 per tank for each active weapon they have over and above the active weapons held by the other team.

   b) In addition, each team receives ₱0.50 per tank from the "bank" for each inactive weapon. Conversely, each team pays the "bank" ₱0.50 per tank for each active weapon.

<u>The Bank</u>

Each team member provides a sum of money, one-third of which is used for the Bank and two-thirds is used to help establish the team's own Treasury. Your treasury's money will be divided among your team members at the game. Bank money will not be returned at the end of the game. In establishing the Bank, your professor will match the contribution of your team. All payments arising out of end-of-set armed-disarmed status will be made to the Bank and/or by the Bank. If the Bank is depleted, your professor will replenish it himself.

<u>Your Treasury</u>

Your Treasury is established initially by the funds raised by team members. All payments arising out of "attack" moves will be transacted between the treasurers of opposing teams. If your Treasury is depleted, team members will have to replenish it.

<u>Initial Steps</u>

Each team takes 15 minutes to:

1. Read these instructions and ask questions.

2. Appoint two <u>Negotiators</u> who can be changed at any time by a majority vote.

3. Set up a Treasury and appoint a <u>Treasurer</u> who keeps track of team funds.

4. Appoint a <u>Recorder</u> who keeps track of all decisions, moves, negotiations.

5. Plan team strategy.

###

/sml-10-13-80

Training Methodology and Techniques for Cooperative Teachers in the Philippines

Seminar held on 30th October 1980

Report of ACCI-PUP Group

I. How can we improve effectiveness of Cooperative Education and Training Program (CETP) in the Philippines?

1. Send cooperative trainors to international training and seminars on cooperatives.

2. Teachers who had been sent to different cooperative training programs either national or international; should be utilized by the institutions where they belong in conducting training programs.

3. The coop education and training program should be based on the needs of the target population.

4. More frequent seminars/workshop to evaluate the impact of current techniques with the end of improving the adopted methods.

5. Strengthening of the present program of integrating cooperatives in the school curricula (all levels).

6. Integrate into one central body the coordination and conduct of the CETP.

II. What facilities and assistance are needed for cooperative teachers to improve/achieve the educational objectives?

1. Cooperative materials (visual aids, literature and hand outs) should be of high quality workmanship.

2. Adoptation of cooperative principles and concept with commercial movie production engaging services of popular movie personalities.

3. Sustained TV and radio skits, songs, promotions variety shows.

4. Increase audio visual units for field use (mobile projectors)

5. Establishment of a center for educational materials on cooperatives which will provide all necessary teaching packages/kits for teachers in the Philippines.

6. Establishe linkages and communication with international and national agencies training, seminars, workshop etc.

<u>Group Members:</u>

Jack R. Batoon
Lennie C. Manzano
Yholie C. Guevarra
Armie B. Peria
Jo H. Lapitan
Noli T. Cuaresma
Belen M. Salcedo
Winnie D. Medina
Cora R. Mabagos
Romy T. Martin

fts/11/3/80

Notes on ROLE PLAYING

I - Meaning

Role Playing

- an educational technique in which people spontaneously act out problems of human relations and analyze the enactment with the help of other role players and observers
- general term referring to the spontaneous acting out of roles in the context of human relations situtations
- part of two other methods namely psychodrama and socio-drama

sociodrama - deals with the interactions of people with other individuals or groups as carriers of some specified cultural role such as supervisor, leader, father, etc.

psychodrama - deals with the unique problems of the individual, alone or in a group, (this needs the guidance of a trained therapist).

II - Advantages of Role Playing as an Educational Method

A. It can bring out data about human behavior and human relations which are not made available by more traditional methods like written records or lectures which may be limited by the fact that it is always presented to the group through the medium of words. It caters to the whole person of the learner for he does not only hear about a problem or tells about it, but leaves through it by acting it out. He experiences it emotionally and then uses this experience to produce and test insights into the problems, and generalizations of dealing with it. He may develop new skills for dealing with problems in human relations.

B. It allows on to get insight into their own and others' feelings and attitudes, which has been widely recognized as a method of helping to broaden one's understanding of himself and of others, and empathize with other people.

C. It allows many attitudes and feelings that fundamentally affect group process, but are usually left unexpressed and subjective to be brought to the group for review. It is a method of illustrating and objectifying many of the causal and dynamic factors in human relations.

D. It is a way of presenting human relations problems in the context of classroom, or training group, where one can experiment behavior, make mistakes, and try new skills without the hurts that experimentation in real-life situations may involve. A learner can try out new behavior in the presence of co-learners.

III - Types of Role Playing

A. Role Reversal

- group members are given roles of those persons with whom they usually interact, e.g., teacher becomes a student, student becomes a teacher, parent becomes a child, etc.

B. Character Role Playing

- Participant becomes a specific character other than himself, and in the situation act as he thinks that particular character would act in that particular situation (e.g., a UPLB student may become Dr. Depositario, a professor of Ag. Ed., or Miss Cruz, a CD worker, etc.)

C. Position Role Playing

- it is like character role playing except that the facts about a person are not given and are left for the one playing the role to fill as he interprets them (e.g. participant becomes a teacher, or a father, or a community leader, etc.)

IV - Role Playing Process

A. Role playing needs a DIRECTOR who

1. helps actors in presenting or portraying their role/s
2. helps audience and observers analyze situations and behavior, and thus increase knowledge and capacity to deal with problems
3. plans for testing insights gained
4. helps the group to be clear of psychodramatic situations by being on the alert to avoid situations and roles leading to personal exposures or are so closely related to personal and private feelings

The director may be the leader of the group or one who is familiar with the role playing process.

B. Reminders in the Use of Role Playing Method

1. Avoid overpersonalization of problems.
2. Avoid overuse of role playing.
   Remember that:
   a. It is not a cure-all gadget
   b. it is useful in dealing with very distinct human situations
   c. it can be enriched by adapting variations and new forms basic to the structure
3. Choose it when useful - not for fun or gimmick.
4. Role playing needs almost no preparation. Important is that they can expose problems, factors causing it, and construct ways of meeting problems.
5. An inexperienced group leader may feel too burdened to charge himself with the sole responsibility so that functions may be shared.
6. Start with very simple situations the group is presently dealing with. Most groups welcome suggestions to try role playing in meetings, however, some groups are quite hesitant and frightened because they are afraid of spontaneous expression and exploration of problems.

C. Steps in the Role Playing Process

1. Defining the problem
2. Establishing a situation
3. Casting characters
4. Briefing had warning up of actors and observers
5. Acting
6. Cutting
7. Discussing and analyzing the situation and behavior, by actors and observers
8. Making plans for further testing of the insights gained or practicing the new behavior implied

V - Major Points in the Steps of the Role Playing Process

A. Defining the Problem

1. The problem should be clear, specific, and not too complex.
2. Focus on a problem that is important and meaningful to the group.
3. The problem is most productive when the need for it arises spontaneously in a group.

This is a suitable method whereby one may gain insight and skill into human relations problems.

B. Establishing the Situation

1. Role playing design
   a. It should be dependent upon the learning outcomes desired or needed by the group.
   b. Planners must work with the training purposes of the group.
2. Ways to design the situation
   It may be done through
   a. a sub-committee who may plan the situation and bring it or present it to the group
   b. a total group who plans the situation on the spot
   c. a member or leader who illustrates the problem
3. Situation
   a. It should provide enough content to make it seem real.
   b. Players and observers should be given a common orientation.
   c. Avoid complexity. The group might be bogged down by irrelevant facts or history.

This step may give opportunity for new insights to be tried and tested in actual practice.

C. Casting Characters

1. Planners must think about
   a. what kinds of character have meaning to the group and can contribute to the group's understanding of the problem
   b. if planners are not familiar with the members, it is best to ask for volunteers or suggestions

2. Members chosen should be
   a. able to carry the role well
   b. willing
      -unwilling may produce constructed and unspontaneous versions of the roles
   c. roles reflecting unfavorable characters should be given to persons with enough status or personal security
   d. in new groups, leaders may be asked to take the unfavorable character roles
   e. beginners should be given simple roles in which they may feel at home and thus help them stretch perceptions and insights

3. In simple situations, oral briefing may do. Overpreparation may restrict the spontaneity of acting out roles.

The casting of characters may be done by the total group or certain members.

D. Briefing and Warming Up

1. The problem should be kept before the group from the beginning to the end of the role playing so that they are reminded why they saw the problem as a significant one.

2. How private or how public the briefing would be, depends upon the kind of data needed for analysis.

3. Don't structure what the actors have to say or do during the briefing and warming up.

E. Acting

1. The director should see to it that everyone should move in the role play.

2. The mood of the play may be destroyed if one of the actors begins to take the role as that of himself rather than the character he is portraying.

F. Cutting

A common tendency is to let the scene to go on too long. Role playing should be cut when -

1. enough behavior has been exhibited that the group can at that moment, be able to analyze the problem
2. the group can project what would happen if the scene were continued
3. the players have reached an impasse because they have been mis-cast or misbriefed
4. natural closing

G. Analyzing the Action

1. The director must be alert to see that the discussion relates back to original problem under study.
2. Discussion may be started by the role players or by the the observers. The advantage seen in allowing the players to comment first is that they will most likely set the tone for constructive criticism by analyzing characters portrayed. This may allow everyone to feel free to express reations.
3. Evaluate, not the acting ability, but what the play can contribute to the understanding of the problem they are trying to solve.
4. Discuss what they saw rather than comment on what should or what could have been.

H. Planning for Testing out Insights and Pinning Down What's Learned

1. Role playing for training purposes helps the group make recommendations on how to improve group practice as well as to reach generalizations about group process and behavior that are applicable in many situations.
2. If skill practice is a purpose of the group, re-playing is needed than if purely to gain insight.

Re-playing may be done by:

a. the same or different players going over the same scene, but making the changes recommended in the discussion

b. the same or different players may try out a probable scene following the one just acted out, illustrating how the recommendations might change the consequences

3. Diagnosis opens up new ways of working at things. Generalizations and the problem can further be explored by:

a. suggesting readings that the group may do to explore the problem farther

b. trying different role playing situations to see if generalizations hold true

c. planning to have future discussions on other aspects of the problem

V - Highlights

Role playing deals with the spontaneous acting out of roles in human relations' problems and situations. In effect, it helps a person/s gain insight and develop skills in the handling of these problems and situations.

There are four major components involved in role playing, namely - a problem or issue; the actor/s or role player/s, the audience or observers, and the director or group leader. It also involves a process.

Role playing process involves a series of steps, namely: defining the problem, establishing a situation, casting characters, briefing and warming up of actors and observers, acting, cutting, discussing and analyzing the situation by actors and observers, and making plans further testing insights gained or pinning down what's learned.

The more spontaneous the portrayal of roles is, the better and more effective it is as a tool for analyzing and exploring situations, problems, and its solutions.

Groups welcome suggestions to try role playing in meetings, however, some are quite hesitant and frightened of utilizing it because they are afraid of spontaneous exploration and expression of problems. To help them gain courage and confidence in this method, start with very simple situations.

Difficult characters, especially unfavorable ones, should be assigned to members with enough security or status in the group, or it may be given to the leader. Beginners should be given roles in which they feel at home. Select role players who are willing and who can carry the role well.

Role playing is useful in dealing with very distinct human relations' situations. This method can be enriched by adapting variations and using other met ods simultaneously with it like group discussion, brainstorming, and other techniques appropriate for the issue or situation on hand.

WCD/PTD/jpa
10/28/80

REFERENCES:

Reeder, William W., "Some Methods and Tools to Increase Interest and Participation and Teaching Effectiveness" (Cornell Extension Bulleting 907).

Adult Education Association of U.S.A., How to Use Role Playing and Other Tools for Learning, Leadership Pamphlet #6, Chicago, Illinois, 1956.

CO-OPERATIVE MANAGEMENT CASE WRITING WORKSHOP

WORKSHOP EVALUATION FORM

NOTE: Do NOT write your name on this form.

If this workshop, or one like it, is run again I would suggest the following changes:

In Content: ______________________________

In Timing: ______________________________

In Administration: ______________________________

In Staffing: ______________________________

In Workshop Member Selection: ______________________________

In Material Provided: ______________________________

In Advance Preparation: ______________________________

Other Improvements: ______________________________

CASE STUDY EVALUATION FORM

	YES	NO
1. This case study includes all the necessary information that would have been available to the person described in the circumstances	/__/	/__/
2. I knew at once from which individual person's point of view I was to view and analyze the situation	/__/	/__/
3. The case study was interesting and I enjoyed reading it all the way through	/__/	/__/
4. In this case study the time sequence was clear and there was no problem involved in identifying the order of events	/__/	/__/
5. Reading and analysis of this case study was a worthwhile learning experience for me	/__/	/__/

CASE TEACHING EVALUATION FORM

		YES	NO
1.	The instructor limited his own participation as much as possible and asked questions rather than giving his own opinions	☐	☐
2.	The instructor effectively guided the discussion without being too obviously directive	☐	☐
3.	Every participant had an opportunity to express his views and to feel that they were worthy of attention	☐	☐
4.	The discussion was well organized; when a group was reluctant to contribute they were stimulated by provoking questions, and when they were too eager the discussion was tactfully controlled		
5.	Comments and disagreements were elicited from the rest of the group rather than coming from the instructor	☐	☐
6.	The instructor made effective use of the chalkboard so that the progress of the discussion was clearly summarized at all times	☐	☐
7.	All the necessary aspects of the case study were covered in the time available	☐	☐
8.	At the end of the session a consensus was reached with or without clearly identified dissenting opinions.	☐	☐

fts/9/11/80

Course on Training Methodology and Techniques
for Cooperative Teachers in the Philippines
(Jointly organized by ICA-ACCI-BCOD and CETF)
October 6 - November 5, 1980

Evaluation Form

(Mark with (✓) what is applicable and don't sign your name)

A1. Coverage:

	Adequate	Inadequate	Excess
(a) What is your opinion on the coverage of the subject matter in the course?	☐	☐	☐
(b) If you consider the topics covered inadequate, what new topics you would like to be added to the syllabus	☐	☐	☐

(i) ____________________

(ii) ____________________

(iii) ____________________

	Adequate	Inadequate	Excess
(c) If you consider the coverage much more than desired, which topics you would like to be dropped without impairing the utility of the course.	☐	☐	☐

(i) ____________________

(ii) ____________________

(iii) ____________________

A2. What is your opinion about the allocations of sessions to the following topics?

	Adequate	Inadequate- (Suggest no. of sessions to be added	Excessive- (Suggest no. of sessions to be dropped)
(a) Role of ICA-CEMAS, ACCI and BCOD in Cooperative Training	☐	☐	☐
(b) Determination of Cooperative Training needs.	☐	☐	☐
(c) Psychology of Adult Learning and Communication Process	☐	☐	☐
(d) Methods and Techniques of Cooperative Training	☐	☐	☐

	Adequate	Inadequate- (Suggest no. of sessions to be added)	Excessive- (Suggest no. of sessions to be dropped)
(e) Case-study Workshop	☐	☐	☐
(f) Role-Play Techniques	☐	☐	☐
(g) Business Games	☐	☐	☐
(h) Other Teaching Techniques	☐	☐	☐
(i) Audio-visual Aids in Cooperative Training	☐	☐	☐
(j) Technique of Training Package	☐	☐	☐

B. Treatment and Handling of Subject including circulation and use of background material.

	Excellent	Satisfactory	Poor
(1) Determination of Cooperative Training needs	☐	☐	☐
(2) Psychology of Adult Learning and Communication Process	☐	☐	☐
(3) Methods and Techniques of Cooperative Training	☐	☐	☐
(4) Case-Study Method in Management Training (Panel Discussion)	☐	☐	☐
(5) Tools of Case Analysis	☐	☐	☐
(6) How to write and teach with the case	☐	☐	☐
(7) Micro-case Exercise	☐	☐	☐
(8) Demonstration of Teaching with Cases	☐	☐	☐
(9) Preparation of Case Studies	☐	☐	☐
(10) Teaching of Cases by Participants	☐	☐	☐
(11) Role-Play Techniques	☐	☐	☐
(12) Demonstration of Role-Plays	☐	☐	☐
(13) Business Games	☐	☐	☐

	Excellent	Satisfactory	Poor
(14) Other Teaching Techniques	/_/	/_/	/_/
(15) Role of Audio-visual Aids in Training	/_/	/_/	/_/
(16) Concept of Training Package	/_/	/_/	/_/
(17) Demonstrations of Training Package	/_/	/_/	/_/
(18) Audio-visual Aids and Techniques (workshop)	/_/	/_/	/_/

C. Have you acquired workable knowledge of the following techniques so as to employ it in your training programmes.

	Fully	Partly	Not Acquired
1. Role-Play Techniques	/_/	/_/	/_/
2. Case Study Method	/_/	/_/	/_/
3. Use of Audio-visual Aids	/_/	/_/	/_/
4. Training Package Technique	/_/	/_/	/_/
5. Business Games	/_/	/_/	/_/
6. Other Teaching Techniques	/_/	/_/	/_/

D1. Do you feel that the objectives of the course have been - Fully Achieved /_/ Partly Achieved /_/ Not Achieved /_/

2. Do you believe that the knowledge and skills acquired by you at the workshop would help you in making your teaching -

Highly Effective /_/
Effective /_/
Not Effective /_/

3. What is your opinion about the over-all conduct of the course

Excellent /_/
Satisfactory /_/
Poor /_/

E. Your General Remarks and Specific Suggestions (if any)