10 240

Personal Copy 9/2/77

CO-OPERATIVE MANAGEMENT

A CASE WRITING

WORKSHOP MANUAL

International Co-operative Alliance
11 Upper Grosvenor Street
London W1X 9PA
United Kingdom

CO-OPERATIVE EDUCATION MATERIALS ADVISORY SERVICE (CEMAS)

Daman Prakash
Personal Copy 9.2.77.

ICA 00898

CO-OPERATIVE MANAGEMENT

A CASE WRITING
WORKSHOP MANUAL

Published by

International Co-operative Alliance,
11, Upper Grosvenor Street,
London, W1X 9PA.

ISBN 0 904380 25 4

TABLE OF CONTENTS

TABLE OF CONTENTS Continued

CO-OPERATIVE MANAGEMENT

A CASE WRITING WORKSHOP MANUAL

This publication has been prepared for the International Co-operative Alliance by Dr. Malcolm Harper of the Cranfield School of Management, Cranfield, Bedford, England.

It is issued as part of the Co-operative Education Materials Advisory Service (CEMAS) project of the ICA as one of a series of publications intended to improve the supply of raw materials for co-operative education and training purposes in developing countries.

The publication is provided as a guide in the organisation and conduct of two-week workshops in the writing and using of Case Studies for co-operative management training. Persons attending such workshops would normally be teachers and co-operative extension officers concerned with co-operative management training.

Co-operative Education Materials Advisory Service (CEMAS),
International Co-operative Alliance,
11, Upper Grosvenor Street,
London, W1X 9PA.

Branch Offices:

International Co-operative Alliance,
Bonow House, 43, Friends Colony,
P.O. Box 3312,
New Delhi 110-014,
India.

International Co-operative Alliance,
P.O. Box 946,
Moshi,
Tanzania.

November, 1976.

INTRODUCTION

NOTE:

Throughout this manual the following abbreviations are used:

WM = Workshop Member i.e. the participants in the workshop

WL = Workshop Leader i.e. the person or people responsible for directing each session

This manual provides the raw material for a Co-operative management case study writing workshop. The material is provided purely as a basis; it must be amended and where necessary supplemented in order to make it suitable for any particular set of local circumstances.

OBJECTIVES:

The objectives of this type of workshop are as follows:

1. To enable WM's to improve their use of the case study method of teaching Co-operative management.
2. To improve WM's knowledge of Co-operative management both through their participation in case study sessions and through face-to-face contact in research in Co-operative institutions.
3. To enable WM's to write case studies in Co-operative management for their own and others use both at the workshop and thereafter.
4. To produce a collection of case studies in Co-operative management which can be published by the sponsoring institution and widely distributed for use nationally and internationally.

WORKSHOP MEMBERS:

A case study workshop can be successful with anything from six to fifteen members. They must all be engaged in Co-operative management training; they may be employed as Training Officers within a Co-operative organisation by a Co-operative College or by a training institution which offers Co-operative management courses as well as other programmes.

It is not essential that WM's should have had prior experience in learning from, teaching with or writing case studies, but some familiarity with the case method will be helpful.

It is vital that all WM's should be free to devote all their time to the workshop while it is running.

SPONSORING INSTITUTIONS:

A workshop of this type may be organised by any institution which is concerned to improve the standard of Co-operative management training. It may be appropriate for a Co-operative College to run such a workshop entirely for its own staff; alternatively the WM's may be drawn from a number of different organisations within the same country, or from a number of different countries.

The sponsoring institution must be willing not only to sponsor the workshop itself but also to finance and undertake the publication and distribution of the resulting collection of case studies. This publication is a vital part of the workshop; it will motivate the WM's and in addition much of the value of the workshop will be lost unless the resulting case studies are made available to Co-operative management trainers elsewhere as well as those participating in the workshop.

LOCATION:

The workshop should ideally be located in a place where WM's are totally removed from the day-to-day distractions of their work and their domestic life; if funds or other limitations prevent the workshop being fully residential, it must be possible for all WM's to work together in the evenings as well as during the days.

If the workshop must be held in the building where some or all of the WM's normally work, they themselves and all other staff must be informed that WM's are not to be disturbed during the programme.

THE WORKSHOP LEADER:

The workshop should be led by one or more leaders who have rather more experience than the rest of the group if this is possible.

There is no reason however, why a group of Co-operative management trainers should not organise a workshop of this sort on their own initiative, sharing the leadership role according to their experience and inclinations.

The sessions are designed so that the WL continually elicits suggestions, experience and insights from the WM's. This is very much a workshop rather than a course and its success depends on the degree to which the WL and all WM's are prepared to share their ideas and experience.

The success of case study teaching depends to a large extent on the instructor taking a guiding and encouraging role rather than acting as the source of knowledge; this workshop itself will only achieve its objectives if the WL acts in the same way.

TIMING:

The suggested timetable given on page 18 is based on a continuous two-week programme; WM's would be expected to have obtained all the data necessary to write their case study before the workshop begins, and they would also have to work throughout the weekend in the middle of the workshop in order to have their case studies ready for 'testing' in the second week.

If the workshop is run in this way WM's will have to gather their basic data from their case study subjects before the workshop begins; guidance is given in the material which is to be distributed to WM's as to how they should go about this task but it is obviously preferable if such data can be gathered after the first part of the workshop, when WM's have learnt something about how cases are used and written.

The continuous two-week timetable should therefore only be used when it is impossible for WM's to carry out case research in the field during the workshop itself. If WM's can return home for anything between one and eight weeks in between the first and second weeks of the workshop, and can then reassemble, this will be preferable. Clearly they must be allowed time by their employers during the interval to gather information and write their case studies.

If WM's <u>must</u> carry out their case research before the workshop begins, it is essential that they should receive the maximum help from their employers, and from the workshop organisers, in identifying Co-operatives which can be used as subjects, and in collecting the data. Some guidelines and suggested questions are provided with this material and should be sent to WM's well in advance to give them some guidance.

CASE STUDY SUBJECTS:

Regardless of the timing of the research, case study subjects must be identified and recruited <u>before</u> the workshop begins. Since WM's are unlikely to have had experience of this type of work before, their employers or the institutions sponsoring the workshop will have to do this for them.

Session 3 of Day 5 covers the subject of case subject recruitment in order to enable WM's to do this for themselves when they wish to write further case studies on their own.

Whoever is responsible for the workship should use this material as a guide for case study subject recruitment; it is important that Co-operatives or other organisations should be made fully aware of what will be asked of them, since a great deal of time can be wasted if they withdraw at a later stage when they realise what is involved.

USING THE MATERIAL:

This manual is designed as a source of ideas; it may be used more or less as it stands or portions of it may be used in programmes which have been independently designed.

The suggested workshop programme is made up of thirty day-time sessions, with evening periods for individual case study writing and analysis of cases written by others.

The sessions can broadly be divided into five different categories:

LECTURE/DISCUSSION SESSIONS:

These sessions cover the techniques of learning from, teaching with and writing of case studies. They are designed to be fully participative and the WL should be sure to involve WM's in discussion not only as suggested but throughout each session.

CASE STUDY SESSIONS:

Eight case studies are provided as examples for use during the first week in order to introduce WM's to case teaching and learning and to enable them to learn more about Co-operative management.

These case studies are provided merely as examples of what can be done. It is far better to use locally relevant material if this is available, but since the workshop itself is being held to remedy a shortage of local material there may well be none which are suitable. If so, the cases which are provided must be amended to include local currencies, names and crops and so on when appropriate.

The case studies which have been provided may be taught by the WL or by WM's; it is important that all the participants should use these cases to improve their knowledge of Co-operative management. Time should be made available at the end of each session for the discussion of the quality of the cases and the teaching, but during the case study session itself everyone must be treating it first as a management training session and only secondarily as an experiment in case study teaching.

Suggested evaluation forms for the case studies, and for the teaching itself, are provided at the end of the manual (pp. 159/160). These may be reproduced and distributed to WM's at the beginning of each session where a case study is to be taught, and the completed forms may then be collected and the results collated as a form of feedback to WM's. Alternatively each WM may be given one copy of each of the forms as a general guide to his evaluation and discussion of the case studies and their teaching, or the forms may merely be used for the guidance of the Workshop Leader. If they are distributed for each session, it is vital that they should be used to evaluate cases provided with the manual, and the teaching of the WL himself, as well as the efforts of the WM's.

3. MICRO CASES:

The taped dialogues, together with written transcripts, are provided as the basis of 'Micro Case Exercises'. These are designed to give WM's practice in the literary task of writing a case study without having to seek for data; the resulting cases, or the samples provided, may also be used as Co-operative management training material in this workshop.

The dialogues should if possible be 'localised' by the inclusion of local currencies, products and so on, and re-recorded prior to the workshop. The blank side of the tape can be used for this.

4. 'OWN CASE' SESSIONS:

During the second week, six sessions are allocated for WM's to test their own draft cases by teaching them to their fellow participants.

It is suggested that two cases can be covered in each two hour session; this demands very tight control and scheduling, and if there are less than twelve WM's, or if more time is available, it is better to allow up to two hours for each case study.

It is vital that each WM should teach his own case study; this provides an incentive to complete the first draft on time, and if the case requires considerable modification and improvement the writer will have learned even more from the experience.

5. EVENING AND OTHER PREPARATION SESSIONS:

All WM's and their employers must be made to realise that when they are nominated for the workshop, it will require their full time participation not only during normal working hours but also during the intervening week-ends and every evening. If WM's do not produce a case study themselves, of if they are inadequately prepared for discussion of those written by their fellow participants, the workshop will not achieve its objectives.

Each session in the manual is prefaced by an introductory page or pages, which gives the following information:

1. The session title and its place in the timetable.

2. The objective(s) of the session, in terms of what it will enable WM's to <u>do</u>. The WL should ensure that each session does in fact achieve these objectives, by asking questions and continually checking that WM's understand the material and are able to apply it to real situations.

3. An approximate estimate of the time taken by each session. This is usually a minimum, and each WL should make an independent estimate for his own purposes and adapt the timetable accordingly.

4. A list of the material which has to be reproduced and distributed to WM's at the time of, or before the session. This may include the eight case studies which are provided with the case teaching sessions during the first week, and are appended to the appropriate session, evaluation forms, or cases to be written by WM's themselves during the Workshop. All material for reproduction and distribution which is provided with the manual is printed on blue paper.

5. A note to the WL covering any special points not dealt with in the subject matter such as the need for modifications in certain circumstances or suggestions for alternative ways of dealing with the subject matter involved in the session.

The actual subject matter content of the lecture/discussion sessions, which constitutes the bulk of the manual, follows the preface to each session. This material is printed in a two column layout, with the basic subject matter on the left and suggestions for questions, discussion points and so on, on the right. These pages should be used as teaching notes by the WL, but they should be substantially amended and modified to take account of local circumstances. Blank space is left in the right hand column for this purpose, and each WL should make this manual into his own personal material by liberal annotation, additions and omissions.

In addition to this introduction, and the actual sessions which occupy pages 19 to 156, the manual also includes a small selection of readings and some suggestions for material to be sent to participants and their employers in advance of the workshop.

READINGS:

The manual includes on pages 161 to 185 three readings which give some general background on the writing and use of case studies; these readings may be reproduced and distributed to WM's if this is judged to be appropriate, or they may provide the WL with additional material for lecture/discussion sessions. They should in any case be supplemented by other articles since the case method of teaching is regularly covered in management training literature.

ADVANCE MATERIAL:

It is essential to describe clearly the objectives and organisation of the workshop both to employers who may wish to nominate WM's and to WM's themselves. The notes which follow on pages 10 to 12 may be used, together with the whole manual, as a basis for recruiting WM's, since some Co-operative training institutions may not be fully aware of their need for and the potential of effectively taught local case study material.

When WM's have been nominated and selected they should each receive a copy of the "Notes to Intending Participants" on page 11 and the "Pre-Course Questionnaire" on page 13 . These papers should be sent out at least a month before the start of the workshop, so that the questionnaire can be filled in and returned well in advance of the first day.

The "Guidelines for Obtaining Case Study Information", together with the Specimen Case Study, which are given pages 15 to 17, should only be sent out if the workshop is to be run without a break over a two week period so that WM's will have to obtain their basic data before the workshop begins. This should if possible be supplemented by some personal guidance using the contents of Session 3 on Day 5, "How to Recruit Sources of Case Studies"; even if the WL himself cannot personally visit all WM's in advance of the workshop it may be possible for a copy of this session to be sent to an experienced member of the staff of each participant's institution with a request that he should provide general guidance along the lines suggested.

PREPARATION AND FOLLOW-UP:

The following schedule lists the various tasks that must be carried out in order properly to prepare for and follow up the workshop. The suggested timing must obviously be amended to take account of mail and travel delays and so on.

THREE MONTHS BEFORE THE WORKSHOP STARTS

Select WM's
Select and obtain agreement from Case Study Subjects
Send briefing, questionnaire etc to WM's

ONE MONTH BEFORE THE WORKSHOP STARTS

Analyse returned questionnaires
(if two-week programme) WM's carry out case research

THE WORKSHOP ITSELF (2 or 3 weeks)

BY THE END OF THE FIRST MONTH AFTER THE WORKSHOP

Edit, retype and obtain release for case studies

BY THE END OF THE FOURTH MONTH AFTER THE WORKSHOP

Publish and distribute the case study collection

DURING THE SIXTH MONTH AFTER THE WORKSHOP

Contact and if possible visit all WM's in order to assess the results of the workshop and to ascertain whether or not they have carried out the programme to which they committed themselves in the final session.

Co-operative Management Case Writing Workshop

Notes for Inclusion in Information to be Distributed to Participants

The objectives of the workshop are as follows:

1. To enable workshop members to improve their use of the case study method in teaching co-operative management
2. To improve workshop members' knowledge of co-operative management both through their participation in case studies sessions and through face to face contact and research in co-operative institutions
3. To enable workshop members to write case studies in co-operative management for their own and others' use both at the workshop and thereafter
4. To produce a collection of case studies in co-operative management which can be published by the sponsoring institution and widely distributed for use nationally and internationally

The workshop consists of three parts:

1. An introduction to the case method of teaching management, practice in teaching with case studies provided by the organisers and sessions on the techniques of case study writing and teaching
2. Guided field work and research in order to obtain data for a case study (this may be carried out in advance of the workshop or at some time during the workshop depending on the organisation)
3. Guided preparation of an actual case study from data previously collected and the opportunity for each workshop member to teach the rest of the group using his case study

Commitment required:

This is a workshop and not a traditional course. Many of the sessions will be led by workshop members themselves with guidance and support from the workshop leader. It is therefore essential that every workshop member should be prepared to devote himself fulltime to the workshop both during the day and during the evening. If workshop members absent themselves from individual sessions or fail to complete the assigned evening work they will not only fail to gain from the workshop themselves but they will also reduce the chances of other workshop members gaining from their participation. Any prospective workshop member who will not be able to devote himself fulltime to the workshop should not pursue his application any further.

Advance preparation:

It is also essential that advance preparation should be properly carried out; if case study research is being carried out before the workshop begins all workshop members must undertake research into a co-operative institution on the basis of the questionnaire and guidelines distributed with this advance notice.

In any case all prospective WM's must complete the enclosed list of questions about their own experience and must be prepared on the first day to give a brief introduction to their own background and reasons for participating.

1. Their name and educational qualifications
2. Their experience of co-operative management
3. Identification and description of the course in which their proposed case study will be used
4. Identification of the subject matter of the proposed case study and a brief suggestion as to the type of problems which will be involved
5. A careful statement of their own personal objective in attending the workshop

CO-OPERATIVE MANAGEMENT CASE WRITING WORKSHOP

Pre-Course Questionnaire (for distribution to participants)

NAME:...

ADDRESS:..

....

SPONSORING INSTITUTION:...

PRESENT JOB TITLE:..

	Frequently	Sometimes	Never
1. How often do you use the following teaching methods?			
Lectures	☐	☐	☐
Case Studies *	☐	☐	☐
Business Games	☐	☐	☐
Project Work	☐	☐	☐
Others (Specify)	☐	☐	☐

* if you use case studies please attach a sample which you regularly use

	Yes	No
2. Have you ever written case studies, exercises or other training material for your own or others use? If so please attach samples.	☐	☐

3. What practical experience have you had in Co-operative Management?

	Yes	No
Employment by a Co-operative Society or Union	☐	☐
Employment by a Government Ministry involved with:		
Co-operatives	☐	☐
Research	☐	☐
Consultancy	☐	☐

4. For how many years have you been teaching Co-operative Management?

Under one year	☐	☐
One to two years	☐	☐
Three to five years	☐	☐
Over five years	☐	☐

Please complete the following sentence:

As a result of attending this workshop I hope that I shall be able to.......

....

CO-OPERATIVE MANAGEMENT CASE WRITING WORKSHOP

GUIDELINES FOR OBTAINING CASE STUDY INFORMATION

(For distribution to WM's if they are required to obtain Case Study information before the Workshop begins a copy of a typical short case should be attached.)

During the forthcoming Co-operative Management Case Study Writing Workshop you will be expected to write a complete case study; this will be reproduced and distributed to your fellow participants and you will be required to teach them using the case study. This final case study, if necessary amended as a result of the teaching session, will be published by the sponsoring institution and made available to Co-operative Management trainers in this country and elsewhere.

Since it will be impossible for you to obtain the necessary information from a Co-operative Organisation during the workshop itself, you must do this before the workshop starts. A good case study must be based on a true situation, and you must arrive at the workshop with all the necessary information; you will during the workshop be given guidance on how to put this material into a form which makes it a genuinely useful piece of training material.

Your employer, or the sponsoring organisation, should introduce you to a Co-operative or other organisation which is willing to provide the necessary information. You should contact them as soon as possible, in order to be sure of obtaining everything you need before the workshop begins.

The attached check list gives some suggestions for the types of information and questions you should ask; you should also bear the following points in mind:

1. Try to obtain some relevant information about the Co-operative before you make your first visit; this will prevent you from wasting time and from asking foolish questions.

2. Remember that your informant has other things to do which are to him more important; be prepared to be interrupted, to be diverted to subordinates or to have to make repeated visits.

3. Do not try to force you informant only to talk about one particular problem or issue. Most Co-operative Managers will welcome the chance to talk to an informed and objective outsider, and useful case study subjects may come up quite by chance.

4. Make it clear from the outset that the information supplied need not go beyond yourself, and that the final case study, disguised if your informant so wishes it, will be submitted to him for approval before it is generally released.

5. Show your informant some typical case studies so that he can have some idea what you are trying to achieve. The sample of a short, simple, disguised but effective case study which is provided with this set of guidelines may be used for this purpose.

6. Invite your informant to observe or contribute to your training courses, and to witness a case study session in progress if this possible.

7. Try to obtain as much written information as possible; any letters, memos or reports relating to the problem on which you decide to focus the case study will make it far more lifelike.

8. If your informant agrees, use a portable tape recorder to make a record of your conversation.

9. After your visits, be sure to analyse all the information carefully and allow time for a call-back to fill in gaps which you have found.

10. Try if possible to produce first a draft of an account of the problem or decision on which you decide to focus your case study. This need not be lengthy or complicated; the sample provided with these guidelines is a perfectly valid piece of training material.

The following check list may be used as a guide during the initial interview:

Background information required:

Date of Foundation of Co-operative

Major function of the Co-operative

Subsidiary functions of the Co-operative

An outline of the technical processes involved together with samples or pictures if they are available

The number of members of the Co-operative

The number of employees of the Co-operative

The job title of the informant and his responsibilities

The organisation structure of the Co-operative

Copies of Annual Reports and Accounts

If Accounts are not available, some indication of annual turnover, surplus and the trend of recent years

If your informant is hesitant, or unclear about the type of information you need, some or all of these questions may be useful to obtain leads to potential case study subjects.

"Can you describe the background and results of some decisions you have taken recently?"

"What problems are facing you right now?"

"What important decision will you have to make in the near future?"

"Describe some major happenings in the history of this Society"

"Do you have any difficulties with your membership?"

"How do you sell your members' produce?"

"Are members completely loyal to their Society?"

"Is this Society growing, shrinking or remaining the same size; can you explain this?"

"Can you describe how you would like this Co-operative to be in five years time? What problems do you foresee in obtaining these objectives?"

"How do you organise your transportation services?"

"How effective are your Committee members as a channel of communication between Management and membership?"

Clearly if the subject organisation is a Government Department or other non-Co-operative organisation, the questions will have to be changed; most managers will be glad to respond to questions of this type and in the course of their answers you will obtain innumerable leads for case studies and information which can be included in them.

CO-OPERATIVE MANAGEMENT CASE WRITING WORKSHOP TIMETABLE

WEEK 1 DAY	SESSION 1	SESSION 2	SESSION 3	EVENING
1	Official Opening and Administration	Personal introductions and group dynamics	Co-operative management training needs	Individual analysis of case study for following day
2	Case study presented by Workshop Leader	The Learning Process	How can we teach co-operative management?	Individual analysis of case studies for following day
3	The Case Method	How to teach case studies	Workshop members lead two case study discussions	Individual analysis of cases for following day
4	Micro Case Exercise 1	How to write case studies	Workshop members lead two case study discussions	
5	Discuss Micro Case Exercise 1	Workshop members lead two case study discussions	How to recruit sources of case studies	
WEEK 2 6	The presentation, disguise and release of case studies	Micro Case Exercise 2 and discussion	Workshop members complete their own case studies based on data previously collected in the field	
7	Workshop members complete their own case studies based on data previously collected in the field	Individual analysis of cases for following session	Two workshop members lead discussion of their own case studies	Individual analysis of case studies for the following day
8	Two workshop members lead discussion of their own cases	Other learning methods	Two workshop members lead discussion of their own cases	Individual analysis of case studies for the following day
9	Two workshop members lead discussion of their own cases	Objectives and evaluation of management training	Two workshop members lead discussion of their own cases	Individual analysis of cases for the following day
10	Two workshop members lead discussion of their own cases	Editing and review of case studies	Evaluation, summary and action commitment	

Day One - Session One

OPENING AND ADMINISTRATION

Session Objectives:

1. To enable WM's to identify the objectives of the workshop
2. To demonstrate to WM's the national high level concern for more effective co-operative management
3. To enable WM's to satisfy themselves on any administrative queries so that they can concentrate fully on the content of the workshop

Approximate Time: 2 hours

Materials Required: Pre-course questionnaires; these should have already been filled in and returned by WM's, if this has not been possible they should be filled in during this session.

Copies of the Workshop timetable, list of WM's and any administrative handouts.

Note to Workshop Leader

It is often the practice to invite a prominent Co-operative or Ministry official to open a workshop of this sort; this can be a great help to workshop members in that it shows them the national importance of improved Co-operative Management and thus of what they are doing but it can also be a waste of time or even damaging if the visitor is poorly selected and not properly briefed.

Who to Invite?

A suitable prominent person might be the Director of the Co-operative College, the Chairman of a prominent Co-operative Union, or a senior official in the Ministry of Co-operatives or a Minister or other Government personality with a known interest in Co-operatives.

A visitor from an educational institution will have the advantage in that he is familiar with training needs and with the nature of case study teaching and is also likely to be known to many of the WM's. An official from a Co-operative Union will be closer to the realities of Co-operative Management and its deficiencies and there may be advantages in inviting such a person because the contact with the course may encourage him to send his staff on training courses. A politician or Government official may be more familiar with both the training and the operational side of Co-operative Management but may be less in touch with the realities of both.

Briefing:

It is obviously impractical to tell a prominent invited guest exactly what to say; he will most probably welcome guidance and will be willing to follow suggestions. The following points may be suggested for inclusion in the opening address.

1. The national importance of existing and future Co-operatives in balanced development
2. The importance of training in satisfying the training needs of existing Co-operative staff and supplying the large numbers of new ones which will be needed if the Co-operative sector is to be successfully expanded
3. The importance of using the best appropriate training techniques available and of acquiring the skill to use them properly

OPENING AND ADMINISTRATION

The objectives of the workshop

A case writing workshop of this sort has three objectives:

1. To produce case studies which will be used in Co-operative Management training both by the workshop members and by Co-operative Management trainers throughout the world.
2. To familiarise or introduce workshop members to the case study method of teaching
3. To provide an opportunity for workshop members to undertake field research and thus come into contact with Co-operative Management problems in the field.

The WM's should notice that this is not a course; it is a WORKshop, WM's will be expected to work at the following tasks:

1. Participating in and learning from sessions about the case method of learning
2. Preparing for and participating in case study discussion led by other WM's
3. Preparing their own case studies based on data already obtained in the field

Ask WM's how many hours a day they had been expected to work in other courses which they had attended; warn them that the workload in this workshop will be substantially greater than anything they have experienced before.

Apart from the three sessions each day WM's will be expected to put in a heavy load of work each evening on preparing their own and other WM's cases for discussion and presentation the following day. It is therefore vital that WM's should not undertake any commitment during the two weeks of the workshop and should devote themselves fulltime to this programme.

Administration

WM's cannot be expected to devote themselves fully to the programme if they have administrative or personal problems; problems of this sort are particularly likely to arise when WM's have come some distance from their homes and are staying in a strange environment which is unfamiliar to them.

The WM's may be worried about some or all of the following questions; depending on their relevance in a particular situation all should be answered for them since they may not express their worries but may have them nevertheless.

1. "Where am I going to eat and sleep during the workshop?"
2. "What money will I need and will I receive during the workshop and how will I obtain it?"
3. "Will I obtain some form of certificate at the end of the workshop?"
4. "How long is the workshop and how many hours are required each day?"
5. "After the workshop what shall I be able to do that I am unable to do now?"

Ask WM's to give their opinions as the answers to these questions, and then tell them the correct answers.

Distribute copies of the timetable and a list of WM's if these have not been given to WM's

Other questions may occur to WM's; all should be answered at this stage.

Finally course members must understand that they will be expected to produce a finished case study which is of a suitable standard for their own use, for publication and distribution for use in other institutions.

Every assistance will be provided by the WL and other WM's but ultimately each WM is himself responsible for putting in the necessary work in order to produce a useful piece of training material.

Stress that the success of the workshop and the achievements of its objectives depends entirely on the effort which is put in by individual WM's.

Day One - Session Two

PERSONAL INTRODUCTIONS AND GROUP DYNAMICS

Session Objectives:	To enable WM's to find out each other's experience and interests, to state their own objectives in attending the workshop and to appreciate the participative nature of the workshop, and the importance of group activity.
Approximate Time:	1 - 2 hours depending on the number of WM's.
Materials Required:	The completed pre-course questionnaire should be returned to WM's for reference during this session.

Note to Workshop Leader

One problem with short courses and workshops of this sort is that WM's may not develop the type of 'group spirit' which is easily developed in a lengthy university course where people have a long time to get to know each other.

In a participative workshop of this sort where WM's are expected to work together and contribute their own experiences and skills to the overall result, it is vital that the group should develop some sort of cohesion at an early stage; this session should familiarise WM's with each other's interests and objectives so that everybody will be aware of what each one, including himself, has to contribute.

PERSONAL INTRODUCTIONS AND GROUP DYNAMICS

Each WM should turn to the person on his or her left and quietly give the following information about themselves:

1. Their name
2. Their educational qualifications
3. Their practical experience in Co-operative Management
4. Their present institution, title and job functions
5. Their objectives in attending this workshop

This method of introduction effectively introduces on a person-to-person level, the concept of shared experience which is vital for the success of the workshop.

WM's should note down what people on their right have told them and should then be asked one by one to tell the rest of the group about the person on their right (if there are an odd number of WM's, the WL should fill the gap so that everyone has a turn.) The WL should in any case introduce himself to the group in the same way.

Avoid selecting the most experienced, the oldest, or any other special WM first. The order of statement should probably go round the table in order to avoid any implication that anyone is exceptional; the WL himself may give his own account of himself, either at the beginning, the end or at some random point between other WM's.

Each WM should spend up to five minutes describing the qualifications, experience and objectives of his neighbour.

When the process has been completed the WL should summarise the experience of the group and show that altogether it makes a body of knowledge which if shared amongst all the members, can significantly improve their knowledge and performance.

Gaps will undoubtedly exist; the WL may himself be able to show that his background fills them or they should be explicitly identified so that WM's attention can be concentrated on them during the workshop itself.

PROPOSED STUDY OUTLINES:

If time allows after WM's have all described each other's experience and objectives each WM should be asked to outline his proposed case study subject, whether he has already collected the data or whether it is to be collected in the field during the workshop.

He should briefly introduce his subject under the following headings:

1. The nature of the Co-operative organisation which is to form the subject of his case study
2. The particular types of problem which he at the moment believes will be the focus of the case study
3. The learning objective of the case study
4. The course in which the case study will be used

Identify subject areas where WM's may not be fully acquainted with the technical details involved; when this is so, remind the particular WM's that they should include in their case study a summary of the technical processes.

If data has not already been collected, and it has not yet been possible to introduce WM's to their case study subjects, the subjects should now be allocated to WM's.

WM's should be invited to comment on these presentations and it may be possible at this stage to amend or re-direct certain WM's whose efforts appear to duplicate those of their fellow members.

Since it is the objective of the workshop that the collection of case studies should be published, it is obviously better if their subject matter should not concentrate too much on one area; it is far more important however that WM's themselves should write a case study about which they feel confident and knowledgeable.

Day One - Session Three

CO-OPERATIVE TRAINING NEEDS

Session Objectives:

1. To enable WM's to describe job responsibilities of potential trainees
2. To enable WM's to determine training objectives
3. To enable WM's to identify those training objectives which are likely to be achieved by the use of case studies

Approximate Time: 2 hours

Note to Workshop Leader

If time allows this session may be expanded and improved by including a contribution from a senior Co-operative Manager or Government Officer who has personal experience of existing deficiencies in the field. In most countries, Co-operative Managers at all levels are in serious need of training, and a prominent outsider may be asked to stress the point that increased knowledge alone is not enough; what is needed are usually fundamental changes in attitudes and behaviour, and existing training activities may not be making a significant contribution to this.

CO-OPERATIVE TRAINING NEEDS

THE OBJECTIVES OF CASE STUDIES:

We have seen that the workshop has as its major objective the production of case studies.

It is important to remember that case studies are not an end in themselves; they are a means to improved training.

Training again is not an end in itself; it is a means to improved performance.

It is thus vital that from the very beginning every instructor and every case writer should be clear in exactly what he is trying to achieve.

It is not enough to state that the objective of a given training activity is to 'improve performance'.

Ask WM's why they are writing case studies; ensure that all WM's see that training is only a means to an end.

Before we can carry out any task involving improvement we must know:

a) what is the initial state of that which needs to be improved?

b) what is the desired state which we want to achieve

Inorder to put this in terms of job performance we need:

a) a description of the way the trainee is presently carrying out his job, or the way he is likely to carry it out if he is not yet holding the position but was to take it up without further training

b) a description of the job as it should be performed

If we take (a) away from (b) we will arrive at the training need of the particular individual.

We can then state our objective in terms of attempting to satisfy the training need, so long as this is practical within the limits of the type of training which we have in mind.

It might be thought sufficient to ask: "what is it that Co-operative Management trainees or managers, committee members or extension officers need to know?"

In fact we are not interested in what these people know; we are interested in what they do; we can simplify our statement of the formula needed to determine training objectives as follows:

a) what do the trainees need to do?
b) what are they doing?
c) what is the difference?
d) the removal of the difference is our training objective

JOB DESCRIPTIONS:

Consider the following job titles;

Replace these titles with locally relevant titles that are familiar to WM's.

Senior Extension Supervisor

Co-operative Accounts Clerk,

Trainee Co-operative Manager
Co-operative Society Committee Member
Co-operative Training Officer

Co-operative Inspector

These, or their local equivalents, may describe jobs to people who are familiar with the actual functions of the people who bear these titles; they actually say very little about what their holders actually do and the impression of job titles may conceal a great deal of confusion about what jobs actually are.

One way of obtaining a description of a job is to ask the person who does it to describe it.

What will you hear when he tells you?

Will you hear a description of what he does?

Will you hear a description of what he believes he does?

Will you hear a description of what he believes other people think he ought to do?

Ask WM's how local Co-operative officials would react if asked to describe their jobs.

Will you hear a description of what other people think he does?

It is certainly true that 'the man makes the job'; it is not entirely possible to describe a job without reference to the person who is doing it.

Nevertheless, an attempt must be made to describe a job in the abstract in order that recruitment, training and the continuity of the Co-operative can continue. What do we need to know in order to have a clear picture of a job?

We need to know the purpose of the job
We need to know the duties involved in the job
We need to know the amount of authority in the job
We need to know the relationship between the job holder and others in the same Co-operative organisation.

Having described the job in these terms we can translate the description into qualities which the job holder must possess in order to be able to do it.

Ask WM's to attempt to describe jobs known to them in these terms.

We can describe these qualities under three headings:

The job holder must have certain knowledge
The job holder must have certain skills
The job holder must hold certain attitudes

Ask WM's to summarise the knowledge, skills and attitudes required for Co-operative Management jobs known to them.

PERFORMANCE APPRAISAL:

We have seen that it is necessary to describe how the job ought to be done and how it is being done before we can see what improvements are necessary.

How can we decide how well the job is being done? Consider the normal criticisms of job performance:

Ask WM's how people normally describe poor management performance.

"He's just no good at his job"
"His figures are always wrong"
"He never gets anything right"
"He does a good job most of the time"

Comments like these give very little guidance of how the job is being performed or what improvements are necessary.

We must be specific in our criticism in order to identify the problems and thus the need for improvement.

This does not involve sophisticated analysis; comments such as this are the beginning of useful performance appraisal;

"He always misunderstands instructions from the manager"
" The farmers never seem to be happy with his calculations"
"He always arrives fifteen minutes late for work"

Ask WM's to suggest more specific brief statements of management deficiencies

Criticism of this sort can point out the way towards deficiencies in knowledge, skills, and attitudes and thus to required remedies.

The case study method is not the only form of training and in a later session we shall examine other forms of training and try to draw some conclusions about which are the most suitable for remedying deficiencies in knowledge, skills and attitudes. Consider the three following cooperative staff and their job deficiencies; let us try to decide whether these failings suggest a deficiency in terms of knowledge, skills or attitudes.

1. The manager of a primary society serving the needs of several hundred farmers who grow coffee.

Deficiency The accounts of the Society are usually presented too late, they are not properly laid out, the calculations usually have errors and the expenses are allocated to the wrong accounts and so on.

This will suggest a lack of knowledge about accounts or possibly a lack of the skill to apply the knowledge actually on the job.

A further investigation will find out whether the manager already has the knowledge or whether he needs training to provide the knowledge and the application skill.

2. A Government Co-operative Officer responsible for visiting agricultural co-operatives and advising them on management problems.

Deficiency The Co-operative Officer gives poor advice in regard to marketing and pricing policies. The Management Committees follow his advice and make losses as a result. It appears that this Co-operative Officer lacks knowledge; he is able to persuade people to follow his suggestions and this indicates that he has the skill to transfer the knowledge about marketing and pricing.

The problem is that he does not have the right knowledge and he needs training in Co-operative Marketing Management.

3. A Committee Member of a medium sized primary agricultural society.

Deficiency This man always recommends policies which will benefit him personally rather than the Society as a whole. He is not actively dishonest but he appears to regard the Society and his position in it as a means of benefitting himself. This appears to result in a lack of the right attitude

Replace these examples with locally relevant situations from Co-operatives which are known to WM's.

of mind to Co-operative and Committee Membership; the training which is needed should attempt to change this man's attitudes so that he becomes a useful Committee Member.

REMEDIES

This workshop has as its objective the writing of case studies which can be used in training activities to remedy performance deficiencies of this sort. How can case studies most effectively be used to improve the performance of Co-operative staff such as those we have already discussed?

Ask WM's how Co-operatives normally try to remedy deficiencies of this sort if they can identify them. Do they tend to say 'training' without specifying exactly what they want the training to achieve?

Ask WM's how they would suggest that the deficiencies just discussed should be remedied.

1.- The manager who was apparently unable to keep accounts properly might benefit again from lectures and reading combined with and followed by case studies which would show him why accounts were useful and how they could be applied to protect the interest of the members and to facilitate improved management.

2.- The Co-operative Officer who needed to know more about Co-operative Marketing might benefit from lectures and reading followed by case studies to enable him to check that he could apply what he had learned in real situations.

3.- The Committee Member may present the most difficult training problem; it is relatively easy to transfer knowledge, and application of skills can be taught by a number of different methods. Attitudes are very difficult to change in any way but case studies and other participative learning methods can make some contribution. If the Committee Member can through case studies examine situations where behaviour such as his damaged the interests of Co-operatives and thus of all of their members, he may begin to change his attitudes through exposure to this type of situation and discussion in the classroom situation.

Throughout the workshop and in actual training activities WM's must remember that their objective is not to produce case studies, to teach courses or even to enable trainees to pass examinations. The objective is to improve performance on the job and everything that is done in this workshop and in all training should be tested by reference to whether it is likely to make any contribution to improved job performance.

Ask WM's to describe situations known to them where training actually improved Co-operative Management performance. What particularly distinguished the training which either succeeded in improving performance or did not?

Day 2 - Session 1

THE DELPHI PYRETHRUM GROWERS' CO-OPERATIVE

Session Objective : To enable WM's to be exposed to effective case study teaching in preparation for their own attempts at teaching and writing case studies.

Approximate Time: 2 hours

Materials Required:
- The Delphi Pyrethrum Growers' Co-operative Case Study
- Suggested analysis of the case study
- Case study and case teaching evaluation forms (Pages 159, 160)

Note to Workshop Leader:

The WL himself should teach at the session in order to ensure that all WM's have experienced at least one case study session before they themselves attempt to teach with and to write case studies.

This case study is a fairly short and uncomplicated one and WM's should have little trouble in handling the simple data and decision making problems that are involved.

The WL should attempt to make the session a 'model' case study session; he should go through the procedure of:

1. Identifying the problems
2. Identifying the possible solutions
3. Quantifying their effects
4. Selecting the appropriate solution

The 'suggested analysis' is included for use by the WL and/or for distribution to WM's if he so wishes. This should not be taken as a model or as the answer since one of the important advantages of the case study method is that it deals with problems to which there are no right or wrong answers. The 'suggested analysis' may show inexperienced WM's something of the ways quite simple case studies can be analysed in writing.

The 'suggested analysis' should certainly not be distributed until after the case study has been properly discussed by the whole group. It is of course important that the case study itself, and all case studies subsequently used in this workshop should have been distributed to WM's at least the evening before and if possible earlier than that. It is basic to the success of the case study method of teaching that all WM's should have had the opportunity to read and analyse the case study well in advance of the session where it is discussed and to have come to their own conclusions as to what should be done. Time also may be made available for WM's to consider case studies in syndicate in order to test their ideas against those of their colleagues and possibly to come to a group solution.

It should not be necessary to discuss this case study for more than one hour; the remaining hour should be used:

a) To evaluate the case study itself

b) To evaluate the way in which it was taught

This should prepare WM's for a similar evaluation process which should follow each case study presentation whenever time is available; the WL should invite comments and criticisms both on the case study and on his own presentation in order to show from the very beginning that he and all WM's should expect guidance, suggestions and criticisms from their fellows throughout the workshop. Only in this way can the WM's learn from each others insights and experience.

The suggested forms for evaluation of case studies and teaching can be used to direct WM's attention to points which should be discussed.

These forms which can be used for each case study session, should be filled in and returned to the WL <u>before</u> the cases, and the teaching, are discussed by the group as a whole. The forms should preferably be filled in anonymously.

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 yeat they has 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 at 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, as last year, and to realise 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 Growers' Co-operative Society might find its flowers unacceptable at any price.

Naz must present the figures to the Society members, and back them up with these points. By analysing 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 costs 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 results 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 in 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.

Day 2 - Session 2

THE LEARNING PROCESS

Session Objective: To enable WM's to describe the learning process and identify the type of learning that is required for effective Co-operative Management.

Approximate Time: 2 hours

Note to Workshop Leader

WM's may react unfavourably to the introduction of material on learning theory, and this session must be related to their task of improving Co-operative Management. It is possible that some WM's have been school teachers at one time; when the subject matter to be taught is generally simple it is often easier to think about the actual learning process than when a complicated subject such as Co-operative Management is involved. WM's who are ex-school teachers should therefore be asked in this session to think back to their school experience and to identify learning methods which appeared to be effective.

THE LEARNING PROCESS

The environment in which people live and in which Co-operative managers must manage is changing rapidly. New techniques, new processes and new products are introduced all the time.

Teaching has in many ways changed less than almost any other activity. Teachers at all levels still teach as if the objective is to learn about what is already known rather than to be able to deal with the unknown in the future.

Children may be taught their two times table in two ways:

Ask WM's how they were taught their tables as children and how their children are taught; is there any difference?

1. They learn to recite "two times one equals two, two times two equals four, two times three equals six, two times four equals eight" etc.
2. They may be shown groups of pairs of objects by the teacher and asked to count the totals in such a way that they realise that it is possible to count in twos as well as in single units.

Clearly the second method is more likely to enable the children to <u>use</u> their two times table in the future.

Ask WM's how they teach subjects such as Co-operative law or accounting; are their methods closer to the second method of teaching children their two times table?

'LEARNING' or 'TEACHING'

Many teachers act as if the objective is for them to <u>teach</u> rather than for their students to <u>learn</u>. A student must learn for himself and the teacher can only provide some assistance and guidance from the outside.

There are many theories of learning but it is possible to generalise the following rules:

1. Nobody can learn for a student, he has to learn for himself

2. Every student learns at his own pace and in his own way and there are certain to be differences in pace and method in any group of students

3. If students are given the responsibility for their own learning they are likely to learn and remember more than if the learning process is not under their control

Ask WM's whether teaching methods familiar to and used by them can really achieve results if these statements are correct.

<u>What is Learning?</u>

Learning need not necessarily take place in the classroom from a teacher. We can learn from experience or from practice; learning can be defined as

> "a relatively permanent change in behaviour that occurrs as a result or practice or experience"

Notice that this definition stresses behaviour <u>and</u> change. What types of behaviour may be changed by learning?

<u>Levels of Learning</u>

We may sub-divide learning into three levels:

1. <u>Knowledge</u> Students can learn facts; they may learn to recite the objectives of a Co-operative, to recite that "management consists of planning, organising, staffing and controlling" or to recite a prayer.

   The playback of the knowledge may be stimulated by an examination question, a verbal question or some other means but behaviour is limited to word of mouth statement rather than to physical change of the environment.

Ask WM's how recitation actually affects behaviour; it may be appropriate to mention religious examples.

2. Skills Students may learn how to do new things, how to operate machines or how to use tools of analysis. They may include accounting techniques, skills of interviewing or handling a difficult members' meeting or ways of controlling money to prevent staff dishonesty. It is important to note that the learning of a skill does not necessarily mean that skill will be applied.

Ask WM's whether dishonest officials are necessarily the worst trained.

3. Attitudes New skills and techniques will only be applied if managers want to apply them. If a committee member believes that the purpose of a co-operative is to serve his interests, if necessary at the expense of other members, he will not apply techniques of fair distribution of surplus however well he has learned them.

   It is necessary to change his attitude so that he will want to apply the techniques.

   Similarly a manager who believes that the members of his society are stupid and will only do what they are compelled to do will not apply techniques for informing and encouraging members however well he has learnt them. He must change his attitude about his members.

These three levels of knowledge, skill and attitude can be matched by what has taken place in the students' minds.

1. Memory If a student merely knows something all he has done is to memorise it. This in itself will enable him to do no more that to succeed in a test of what has been learned by reciting it or writing it down.

Ask WM's to what extent exam success leads to actual success in a profession.

2. Understanding If a student has acquired a skill he will understand how to do something and will be able to do it once he has left the learning environment, providing he wants to.

3. Application If a student has learned and understood new skills and then changes his attitudes he will apply the new skills as they are appropriate and the learning process will thus have been successfully completed.

Conditions Favourable to Learning

Learning will only take place if conditions are favourable. What conditions are necessary for learning to take place?

1. Motivation The students must want to learn. People's motives differ; students of Co-operative Management may wish to learn for one or more of the following reasons:

   a) they wish to improve the results of their Co-operative
   b) they wish to avoid being dismissed for incompetence
   c) they wish to impress their friends with high sounding words about new techniques
   d) they wish to obtain another job outside the Co-operative movement
   e) they wish to find out more about techniques for controlling dishonesty so that they can learn to avoid being found out
   f) they may wish to increase their income

   These and many other reasons may be the motives that cause people to learn but unless they have some strong motive which overcomes their natural reluctance to change, people will not learn.

Ask WM's why they have come on a workshop; do they and and do their trainees actually want to learn?

2. Feedback Students will not learn unless they know that they are learning. They need to know that they are successful or that they have not yet learned what is required.

   Feedback must be rapid, personal and accurate.

Ask WM's to what extent their their students are actually able to feedback their understanding, confusion and so on to them, the instructors.

A student must be able to recognise exactly where he has gone wrong and have frequent opportunities to test his knowledge by applying it to reality.

3. Reinforcement A student is more likely to learn if he is rapidly and personally rewarded for successful learning.

Ask WM's how farmers teach animals to work on the farm; is reward or punishment usually the most effective?

Ultimately he will be rewarded by higher earnings, better results or whatever is the origin of his motivation. This will not happen in the classroom and it is therefore necessary for success in learning to be recognised and rewarded by congratulation and group esteem as often as possible.

4. Practice and Repetition Learning is at all times being eroded by forgetting. It is therefore necessary that the lesson should be repeated and opportunities given for application which will both verify that learning has taken place and repeat the lesson itself.

If repetition is identical students will become bored and learning certainly will not take place. It is therefore necessary to repeat lessons in different circumstances and to apply them to different situations.

5. Transfer The learning situation should be as close as possible to the real situation where what is learned is to be applied. Students should be given an opportunity to test their own understanding by applying what they have learned to situations which are as close as possible to those they experience in their everyday job.

Ask WM's how different this situation is from that in which they normally work. How similar are their classrooms to the places where their trainees work? How do they attempt to bridge the gap?

Day 2 - Session 3

HOW CAN WE TEACH CO-OPERATIVE MANAGEMENT?

Session Objective: To enable WM's to describe the place of the case method in the total concept of the management education process.

Approximate Time: 2 hours

Note to Workshop Leader

There are few fundamental differences between Co-operative Management and the management of other enterprises in the public or the private sector. It may therefore be useful in this session to examine the ways in which management is taught in other institutions with which WM's may be familiar. If a particular course or faculty is well known for its innovative teaching methods and successful results, the instructor who is responsible for it may be invited to this session to share his ideas and to suggest how they might possibly be applied to the task of Co-operative Management Training.

HOW CAN WE TEACH CO-OPERATIVE MANAGEMENT?

Before we can discuss how to teach management, we must be clear exactly what we want to teach:

what are our objectives?

exactly what are we attempting to enable the trainees to do?

Ask WM's for examples of the objectives they have set for courses and individual sessions for which they are responsible.

1. Are we trying to enable trainees to answer questions in an examination, to recite the rules of the Co-operative?
2. Are we trying to enable trainees to keep accounts properly, to draw up a control system for the transportation service or to apply predetermined rules to the problem of distributing surplus?
3. Are we trying to enable trainees to apply techniques to situations which neither they nor we can now foresee or are we trying to enable trainees to want to apply these techniques and to have definite attitudes to their jobs?

We probably want to do all these except the first; correct re-call of information for an examination is of questionable value in school education but of no value whatsoever in post-experience training such as Co-operative Management training.

Ask WM's how primary and secondary school education operates and is evaluated in their country; how effective is it in preparing pupils for real life?

We can say few things with certainty about the future but we can say that it is certain to be different and that change will be the order of the day.

Whitehead, the English philosopher, said:

"The fixed person for the fixed duties who in older societies was such a godsend, in the future will be a public danger."

Ask WM's for examples of civil servants or other officials who are 'fixed persons for fixed duties'.

Products, processes and methods change; we must try to train Co-operative Managers to cope with change and this clearly does not mean training them to do things in pre-set ways.

There are two basic approaches to management teaching; one, to DESCRIBE the process of management in the hope that better understanding of what is involved will contribute to improved performance; two, to try to allow trainees to actually EXPERIENCE various aspects of management so that they may in the classroom practise management in reality.

DESCRIPTION

The real world has inevitably to be broken up and categorised for teaching purposes; universities have faculties of economics, philosophy, theology, language, medicine, etc.

Ask WM's to describe the way in which Co-operative Management is broken up for purposes of teaching responsibilities in their own Institutions; to what extent does this classification reflect the reality of Co-operative Managers' responsibilities?

In the same way management has to be divided up if it is to be taught or written about because it is impossible to deal with a whole subject all at once. This form of academic division is inevitable but artificial since the real world is at all times an indissoluble mixture of all the various aspects which teachers try to treat individually.

How can management be divided up for teaching purposes?

1. The traditional approach has been to divide management into four activities of planning, organising, staffing and controlling.

WM's will probably be familiar with this analysis of management ask them how knowledge of it can be said to improve the manager's ability.

This may be useful in an attempt to analyse and describe the practice of management and it may also be useful if managers remember that all four functions must be carried out. It is difficult however to say at any time when a manager is doing each one of these four functions and knowledge of this division and of further details and sub-divisions does not contribute a great deal to more effective management.

2. Management may be divided up into the various skills and techniques which are involved. Quantitative methods, behavioural science, organisation theory, systems analysis and so on may all be taught separately since these subjects include the <u>techniques</u> which are necessary for effective scientific management. It is obviously necessary to teach techniques separately in this way but there is a need for an integrating process since otherwise it is rather like teaching a carpenter to use tools without giving him any idea of the objects which he can make with them.

Refer if possible to examples of highly trained specialists who are perhaps not as effective at Co-operative Management as less highly trained but more experienced staff.

3. Management can be divided up into the various functions which are in larger organisations carried out by different people.

They include marketing, accounting, personnel management, production management and so on. This type of division accurately reflects the specialist roles which individual managers have to acquire but it has certain deficiencies:

Ask WM's whether primary societies can afford functional specialists in this way. What are the implications of their answer for the success of training courses and sessions which are split up this way?

a) the newcomer to management may fail to understand the role of his particular department or function in the operation of the whole organisation

b) when a specialist reaches the point at which he may be promoted to general manager it is possible that if his training has only related to his specialist function he may be unable to take on a more senior general management role.

EXPERIENCE

If we are to try to enable students to experience management in the classroom we clearly have to devise some method of simulating real conditions since we cannot train managers simply by asking them to be managers in real life. It is worth examining at this point the arguments in favour of training; many people say that the only way to learn to be a manager is to be a manager; what are the advantages of trying to simulate experience in the classroom?

Ask WM's to re-examine the reasons for undertaking training of any sort; could not on-the-job training replace all types of courses which take place after fulltime training is completed?

1. Real management is too expensive; mistakes cannot be rectified and they may cost a great deal of money.

2. Real management is too slow; we must try in the classroom to compress into one course the experiences of a lifetime or at least of many years since training on the job alone takes far too long.

3. Real management is unguided; we can in the classroom provide guidance both from the instructor and other participants which will help trainees to learn as they carry out simulated management tasks.

4. Real management is unstructured; in the classroom we can introduce subjects in an increasing order of difficulty and we can structure the course from the point of trainees' present knowledge and reach a predetermined goal or objective at the end; it is impossible to structure a real management experience in this way.

5. Real management may have little or very delayed feedback. When a manager makes a good or bad decision he may not know for sometime how well he has done; in the classroom we can give immediate correction or reinforcement and we have seen that this is an important element of effective learning.

We shall be discussing alternative methods of learning later in the workshop; it is important at this stage to summarise the various ways in which we may simulate management experience in the classroom

Ask WM's whether their trainees actually feel as if they are managing a Co-operative when they are undertaking training; is it necessary that they should feel this way and if so how can this feeling be created?

1. The Project Trainees actually go into the field and carry out a genuine management task. This obviously has the advantage of reality but also shares most of the disadvantages of real life management as a form of training.

2. Role-play The trainees actually play the parts of managers and thus experience the type of interpersonal relationships which are involved in management.

   This method is valuable for simulating the personal feelings and interpersonal skills involved in management but it is impossible to include quantitative and other aspects in role-playing exercises.

Ask WM's to recount their experience of each and to discuss the advantages and disadvantages of each of these learning methods.

3. Games The trainees play the part of managers in an interactive competitive situation where they are competing with other individuals or teams; this method is very time-consuming and although a game can effectively simulate the reality of the time pressures and competitive aspects of management, it has to be very artificial and over-simplified if it is to be manageable.

4. Case Studies The case study is a written description of a real management situation which trainees have to analyse and discuss. It is only one form of simulated experience and we have already seen that management can also be taught by description as well as by experience.

The Co-operative Management teacher must be familiar with all methods of teaahing and be able to recognise the types of situation where each is applicable.

It is not usually appropriate to teach management entirely by lectures; it is probably only slightly more useful to teach Co-operative Management only by case studies; modern management teachers have a wide variety of learning techniques at their disposal and they should make use of each one as it is appropriate.

Refer back to the pre-course questionnaire; discuss the extent to which WM's concentrate particularly on the lecture method of learning; could their courses benefit by the inclusion of a wider variety of learning methods?

Copies of 'Participative Learning Method' published by ICA/CEMAS, may be distributed at this point if available.

Day 3 - Session 1

THE CASE METHOD OF TEACHING MANAGEMENT

Session Objective: To enable WM's to describe the basis of the case method and to identify its strengths and weaknesses.

Approximate Time: 2 hours

Note to Workshop Leader

If WM's have little experience with teaching methods apart from lecturing they may come to believe that case studies are the only effective way of teaching; it is important to stress to WM's who have little experience of participative learning methods that case studies are only one approach, and that they are not always the most effective way of achieving a specific objective. WM's may have attended general teaching workshops, where they have been exposed to a wide variety of learning methods; if they have had this experience, this workshop should enable them to use the case method more skilfully and also introduce them to the possibilities of creating their own material.

THE CASE METHOD OF TEACHING MANAGEMENT

We have seen that management can in many ways best be learned through simulated experience rather than by listening to or reading a description of the management process.

How can the case study method allow trainees to experience management in the classroom?

A case study is a written description 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 the manager in the situation described.

Ask WM's to describe the ways in which they use the case method or in which they have learned from it; what are the advantages and disadvantages

How did this perhaps rather obvious method of teaching arise?

In the early years of the twentieth century management education was pioneered at the Harvard Business School in the United States; many authorities believed that it was impossible to teach management since it was an art which could only be learned on the job as opposed to a science which could be learned in the classroom or laboratory.

The pioneers of management education studied the method adopted in other disciplines and in particular of teaching methods in medicine and the law.

1. Medicine They observed that much of medicine is taught by studying cases; in a 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 diagnoses and remedies and recommends what he believes to be the correct diagnosis and remedy.

2. The Law 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 classroom and then to an actual legal argument 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 describe what will happen when certain physical conditions are fulfilled; much scientific training consists of learning to recognise situations as being examples to which previously developed laws apply.

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.

Ask WM's to what extent it is possible in management to apply rules of precedent merely by referring back to a similar situation.

As the case study method has developed, management educators have realised that the students do not learn to recognise situations of a particular type; they learn to analyse and to decide, and the data on which their analysis and decisions are based is of less importance than the training in the actual method, techniques and attitudes involved in business analysis and decisions.

Give examples where substantial past experience has not prevented a Co-operative Manager from making mistakes in today's fast-changing environment.

Management educators also recognise that the traditional disciplinary categorisation of a subject was in many ways inappropriate for training since every management decision involves many different disciplines; realistic descriptions of real situations include every aspect.

How does the case method work?

Case studies can be used in a number of different ways but there are normally three stages in the teaching process:

1. The trainees are given the writen case study one day or more before the session at which it is to be discussed and they are given time to analyse the data and to decide what should be done.

2. (This stage may be omitted). The students or trainees meet together in small groups of between three and eight members and discuss the results of their individual analysis together. They may or may not come to a group consensus but each group member can test his ideas against the conclusions of the others.

3. All the trainees meet together in a plenary session at which they discuss their individual conclusions under the guidance of an instructor and from which a class consensus may or may not arise.

Ask WM's how they use the case method; do they rely entirely on individual preparation or do they have their trainees meet before the plenary session in small groups?

(In this workshop it is wise to use the intermediate small group method once or twice at least although time will prevent it in most sessions).

What are the advantages of this method of teaching?

1. Trainees are encouraged and even forced to develop their own guidelines and generalisations as a result of their own study of management situations.

2. Trainees obtain practice not only in analysis and decision making but in presenting their analyses and decisions and in defending these against the perhaps contrary judgements of their fellows.

   A correct management decision is of no value unless the manager can persuade his colleagues to agree to it. The case method provides an invaluable training in this skill.

Ask WM's to what extent they, or their trainees, are willing to criticise each other's suggestions. How can positive criticism contribute to improved learning?

3. The case method allows and compels every trainee to contribute his own insights and judgement to the group's learning experiences. The learning input originates not only from the instructor but every trainee can benefit from the experience, knowledge and insights of every other one. This is particularly valuable in post-experience training such as Co-operative management training where every trainee brings a wealth of experience to the course which cannot be shared in traditional lecture sessions.

Stress that you, the WL., know considerably less about some aspects of Co-operative Management than some of the WM's. Ask them whether they know as much about Co-operative Management as their own trainees do altogether or even individually.

4. Since we have seen that the only certainty is change, the case method is valuable because it prevents unwise generalisations and 'learning of rules'; it forces trainees to recognise that each situation is different and each decision must be approached on its merits.

5. It has been suggested that effective management consists eighty per cent of identifying problems and only twenty per cent of solving them. The case method of management training can be used most effectively to force trainees to identify the problem before they start to look for solutions.

Ask WM's for examples of Co-operative Management problems they have known where incorrect identification of the problem prevented any correct solution.

6. Experience of participating in case study discussions teaches trainees that there are no right or wrong answers to management problems; management decisions are a matter of judgement and the variety of opinions in a case study discussion, each of which may be ably defended by its protagonist, shows trainees that every genuine management problem may have a large number of appropriate solutions.

7. A good case study, with an effectively guided discussion, allows trainees actually to feel that they are part of a management situation rather than observing it objectively from the outside.

8. Case Studies allow trainees themselves to test techniques they have learned by applying them to simulated reality; when a trainee has discovered for himself that a technique helps him to solve a problem he is far more likely to remember it and to apply it in the future.

Disadvantages

The disadvantages of the case study method arise most frequently from incorrect application rather than from inherent disadvantages; there are however difficulties and problems which instructors must be prepared to face:

1. Trainees who are used to rote learning may find it difficult and in fact painful to subject their own ideas to criticism and contradiction by their fellows. They may themselves for that reason be unwilling to enter into meaningful discussion even though they hold different opinions since they are afraid of causing their colleagues to 'lose face'.

2. The instructor himself must be willing to admit that trainees may have original insights which he himself has not up till then appreciated; many instructors are unwilling to admit they are not the source of all knowledge on a subject.

3. It is difficult to control the structure of a course using the case method since nearly every case involves large numbers of different issues and may be analysed on different levels depending on the experience and wishes of the trainees.

4. Because of the inter-disciplinary nature of learning by case studies trainees may learn to be general managers rather than to be less senior functional department heads.

Discuss trainees' unwillingness to express their own opinions and their fear of 'losing face'; how can inhibition of this sort by avoided without destroying valuable cultural norms or causing personal unpleasantness?

5. The case study must inevitably include less information than is or might be generally available; trainees may come to believe that Co-operative Management decisions are easier than they really are.

<u>When should the case study method be used?</u>

Ask WM's why they presently use case studies if they do; are these good reasons?

Case studies should <u>not</u> be used:

1. Because there happens to be one available on a particular subject.
2. Because the instructor likes teaching with case studies.

Case studies should be used when they are the most appropriate way of achieving a particular learning objective.

It is possible to teach many techniques such as accounting and statistics by the use of case studies but most teachers will prefer to use lectures, seminars and discussions for this purpose.

One method of using case studies is as follows:

1. At the beginning of a course in order to show trainees what types of problems they have to tackle and to demonstrate to them that they need to learn new techniques in order to solve these problems.
2. At the end of a course in order to give trainees a chance to apply and test the techniques that they have learned during the middle part of the course.

Each instructor will find his own way of using case studies but it is particularly vital in the field of Co-operative Management that a large number of case studies should be written since free choice to use case studies depends on the availability of material.

Ask WM's how many locally applicable case studies in Co-operative Management are available to them; is this in fact the main reason why they do not use more case studies?

Day 3 - Session 2

HOW TO TEACH WITH CASE STUDIES

Session Objective: To enable WM's to use the case method effectively in teaching Co-operative Management.

Approximate Time: 2 hours

Note to Workshop Leader

Some or all of the WM's may have previously taught with case studies. All will benefit from this session, but it is important to avoid giving the impression that all WM's are novices in case teaching if in fact some have considerable experience. Those who have used them before should be asked to describe how they use case studies, and to discuss the difficulties they have experienced. WM's who have not themselves taught with case studies may well have been taught in this way; they too should be invited to comment on the more and less successful teaching approaches which were used by those who taught them.

HOW TO TEACH WITH CASE STUDIES

We have seen that 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 trainee should have an individual copy of the case study so that he can mark important passages and treat the copy as his own.

2. 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 absurd 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 the 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.

Ask WM's whether they are able to give each of their trainees individual copies of case studies which they can mark and need not be returned. Point out that money spent on simple duplicators and paper is probably better spent than on complicated audiovisual aids which may not be maintained and are rarely used.

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.

Ask WM's whether their trainees have enough time and are willing to prepare in this way; how can courses or their trainees' motivation be changed in order to permit this sort of preparation? Stress that WM's must themselves prepare case studies in this way during the workshop so that they can understand what is involved when they require their trainees to do this.

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.

Ask WM's whether they believe that more, less or the same amount of preparation is necessary for a one hour case study session or a one hour lecture session.

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.

Refer back to the Delphi Pyrethrum Growers case; show that there are other ways of analysing this case study which were not discussed by the class but had to be foreseen by the WL in case WM's had chosen to treat the case in this way.

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.

Ask WM's what proportion of the time they would expect to occupy as instructors during a lecture; and during a case study.

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 elicit a correction from another trainee rather than give it himself.

5. Instructors should carefully avoid ridiculing 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.

Ask WM's how they normally deal with trainees who are not willing to volunteer their own ideas. Do they normally find that one or two trainees monopolise the discussion? If this is happening in the present workshop point it out and ask for more contributions from everyone.

7. The instructor should be prepared to act as secretary by summarising trainees' contributions 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 consensus should be reached and intelligent disagreement should be possible on all genuine management decisions.

Refer back to the Delphi Pyrethrum Growers case and to WM's evaluation of this session; point out how the session followed these guidelines and ways in which it failed to do so.

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 in 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 problems?"
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 qualitative aspects must be considered in addition to the figures?"

Ask WM's how they start trainees talking. Refer back to your own attempts to break silences if such silences have occurred. Ask WM's to suggest questions which can be used to stimulate discussion.

15. "What criteria should we use for selecting a particular alternative?"

16. "Is this alternative really practicable in the situation described?"

List these questions on the board or prepare and distribute a list of them and others.

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 insights 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.

Ask WM's who are experienced in case study teaching whether they spend less time preparing for sessions after they have used the same case study several times.

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.

Day 3 - Session 3

CASE STUDIES IN CO-OPERATIVE MANAGEMENT

Session Objective:	To give WM's practice in learning from and teaching with simple case studies in Co-operative Management.
Approximate Time:	2 - 3 hours
Materials:	Case Studies; 'The Sondo Dairy Farmers' Co-operative Society' and 'Rainbow Co-operative Farm' - Case study teaching evaluation forms.

Note to Workshop Leader

These two case studies should each be taught by a different WM to the rest of the group. The workshop 'package' includes five case studies which are to be taught in this way in addition to the 'Micro cases' and the Delphi Pyrethrum Growers Case which it is suggested should be taught by the WL in Day 2 - Session 1.

If more than five of the WM's have little or no experience in teaching case studies then further case studies should be obtained so that all WM's have an opportunity to try their hand with a case study before they set about writing one.

If on the other hand, all or most of the WM's already have some experience of teaching with case studies, it may only be necessary to allow two or three of them actually to teach with case studies before the writing starts; in these circumstances the most appropriate case study of the two supplied with this Session and the two supplied with Day - Session 3 should be used or, as with all case studies, those supplied should be replaced with material which is more relevant to local circumstances if this is available. These cases must be distributed to WM's well in advance of the session where they are taught and the evenings should be kept free for individual and possibly syndicate preparation; it is vital that WM's should not feel that they need only prepare those case studies which they themselves are going to teach. They will be doing a great disservice to their fellow WM's if they do not properly prepare every case study which is taught during the workshop. Discussion of these and similar case studies about Co-operative Management can easily concentrate on criticism of past errors and mismanagement rather than on recommending exactly what should be done now in order to remedy the situation. In many countries there are innumerable cases of Co-operative mismanagement, such that the whole Co-operative movement runs the risk of falling into disrepute. It is easy to criticise poorly trained and inexperienced members and their staff for their failure in the past; it is far more difficult to decide what should be done both in individual societies and in the nation as a whole to put matters right so that the many advantages of the Co-operative system of ownership and management can be exploited for the benefit of the people.

The difficulty of concentrating on future decisions and policies should not lead the group to concentrate on criticism of past mistakes.

EVALUATION OF TEACHING AND CASE STUDIES

Time must be allocated to discussion and evaluation of the way in which each case study is taught and of the case study itself. The forms supplied should be filled in by WM's and their conclusions should be shared and discussed with the WM who actually carried out the teaching role for each case study.

Criticism should be frank and helpful and it is important that WM's should develop a spirit of accepting constructive criticism, since comments of this sort will be invaluable in their efforts to produce useful case studies themselves in the second half of the workshop.

THE SONDO DAIRY FARMERS" CO-OPERATIVE SOCIETY

Sondo was famous for its fine cattle and for its production of milk. Between 1963 and 1966 about 500 farmers were settled in the area, and most of them had started small dairy farms. The majority of them did very well, and by 1970 there were more grade cattle in Sondo than in any other area in the country. They sold their milk to the National Creamery, but it was always difficult to arrange for reliable collection from the farms and for delivery to the factory, which was about thirty kilometres away.

At the beginning of 1975, two hundred and fifty of the more successful farmers agreed that they should get together to organise a satisfactory system of milk collection and delivery. They thought that if they could act as a united body and offer a big contract to one of the transport contractors, they would be able to demand a cheaper and more reliable service. They also believed that if they made a success of this job they would be able to attract more members and be able to carry out other services. These might include bulk buying of cattle feed, education courses on dairy practice, or even the installation of their own milk processing machinery.

The two hundred and fifty farmers elected a committee and a chairman, and they each put in $40, a total of $10,000, to form the Sondo Dairy Farmers' Co-operative Society. The committee appointed a manager to organise the collection and delivery serivce. At the end of December, 1975, after one year, he presented the following figures to show how their business had done.

1. They had sold 1,000,000 litres of milk to the National Creamery, at an average price of 4 ¢ a litre, which made a total of $40,000.
2. The Government Co-operative adviser had recommended that they pay the members 3.2¢ a litre for the milk that had been collected, and the committee had agreed with his advice. The members had therefore been paid at this rate for the 1,000,000 litres of milk they had produced and sold the the Co-operative.
3. The manager had been paid a salary of $25 per month for 12 months.
4. Collection and transport to the National Creamery had cost a total of $5,000
5. The Society had paid $100 for the rent of their offices for the year.
6. There had been twelve committee meetings, and the members' expense allowances had totalled $5 per meeting.
7. The Society had paid $140 for bus fares, stationery, postage and other small items.

8. The Society had paid a total of $200 for office furniture and a second-hand typewriter.

9. There was a balance of $12,200 in the Society's bank account.

The committee considered these figures at their meeting in January, 1976. They wanted to know how much profit, or surplus of sales over costs, the Society had made during 1975. They also had to decide how much of this surplus, if any, should be given back to members in proportion to how much milk they had sold. One member of the committee had argued that the $12,200 cash should all be given back to the members, and another said that the Society had received 4¢ for each litre of milk and had only paid the farmers 3.2¢, it should now refund the difference, of 0.8¢ for every litre produced. He did not say how this could be done.

Questions for the Sondo Dairy Farmers' Co-operative Society:

1. What was the total cost per litre of the milk delivered to the National Creamery, including the management and administration of the service?

2. Why did the Society pay the members only 3.2¢ a litre for their milk, when the National Creamery had paid 4¢ a litre?

3. How much profit had the Society made during 1975?

4. Why had the members paid $40 each into the Society at its foundation? Should this payment now be refunded?

5. Should the members of the Society receive any further payment for the milk they produced in 1975 and if so, how much per litre?

6. Is the Co-operative now is a position to expand into other services? If so, what should these be, and what are the implications of each?

RAINBOW CO-OPERATIVE FARM

Two years ago, 230 landless people decided to get together to buy the Rainbow Farm, a 1,450-acre holding. The Government granted them a loan of $50,000 which was to be repaid at 6% interest over ten years.

After having received the loan, a meeting of all the members was convened in order to decide how to begin the farming business. A few members suggested that they should elect a manager. Others refuted this statement on the grounds that the manager would need a salary and might be corrupt. They also argued that if there was a manager of the Co-operative, the individual members would not have the right to say what they wanted so that there would be a dictatorship. Therefore, they decided to elect a committee of thirty members who had a wider knowledge of farming than the rest and would allocate the land to various crops and livestock. They also decided to buy machinery for $2,500 and livestock for a total of $2,700.

The land was allocated as follows:

Maize	100 acres
Wheat	180 "
Grazing	500 "
Timber	275 "

All the members lived on the farm and therefore each was given 1 3/4 acres for a house and personal plot. This occupied about 400 acres, and the balance was occupied by service roads.

The variable costs for each crop could be fairly determined. The figures for wheat for example, were approximately:

Labour	$1,200 per annum
Storage	$150 per annum
Transportation	$900 per annum
Total	$2,250 per annum

The total variable cost for maize was about $1,000 per year and the total for the whole farm was approximately $5,000 per year. Fixed costs which did not include depreciation were about $4,100 each year.

Last year the value of the output from the farm was as follows:

Wheat 3.5 bags/acre at $4.50	$2,835
Maize 15 bags/acre at $2.00	$3,000
Milk sales	$2,160
Local milk sales	$500
Timber sales	$500
Total	$8,995

At the end of the second year the members needed $5,000 to meet their annual loan repayment which they had agreed at the beginning to pay from their own pockets. Members were now dissatisfied with the way the farm was being run. They demanded to know exactly how the money was spent and why they were running the business at a loss. They believed that the committee members they had appointed were corrupt.

The most outspoken member suggested that the committee should find out if costs could be reduced by stopping some crops or reducing their production. The Chairman of the committee vaguely examined the figures in his books. He could not see how to use them. He said to himself, "after all, these figures are not important and they will not improve the situation". He summoned his committee to help him solve the problems. He asked them to suggest ways which could be used to improve their farming. He also asked them how they should satisfy the other members of the Co-operative, who were by this time demanding the demarcation of the land so that each member should have his own plot.

One member suggested that more land should be given to maize and less to wheat, for maize brought more money than wheat. Two other committee members suggested that another loan should be granted by the Government to meet the increasing costs. Another rejected this suggestion and said that they could not ask for another loan because this would increase the costs. He suggested that all the machinery should be withdrawn and more labour used. The rest of the committee kept silent because they did not understand the suggestions and had no ideas of their own.

The Chairman adjourned the meeting until further notice without having decided what to do. He went home, looked at the figures in his books and said to himself, "I'm going to resign". Because of the Chairman's resignation, a special members' meeting was convened.

As the local Co-operative Extension Officer, what advice would you give to the members?

Day 4 - Session 1

MICRO CASE EXERCISE 1

Session Objective:	To enable WM's to practice creating a useful case study as a result of conversation with a practising Co-operative Manager.
Approximate Time:	1 - 2 hours
Materials:	Taped dialogue of Micro Case 1 or transcripts if tape cannot be used.

Note to Workshop Leader

This exercise provides a 'simulation' in case writing which should give WM's some feeling for the task in putting together a case study.

The procedure should be as follows:

1. Explain to the WM's that, in line with the general philosophy of 'learning by doing' they are now to have the opportunity of writing a 'Micro Case' based on a dialogue between a Co-operative lecturer and the Manager of a Primary Co-operative Society. Explain that they are now to listen to the dialogue; they should take notes as they would if each of them actually was the lecturer and then they will be given approximately one hour to write a very brief case study based on the dialogue. Stress that they can use their own imagination as much as they wish; the dialogue is only provided as an initial stimulus.

2. Play the tape recording or if a tape recorder is not available, select 2 WM's to enact the dialogue to the rest of the group. They may ask for it to be played twice; if so they should be allowed to hear it again.

3. Allow WM's the rest of the session to write a simple, brief case study based on the dialogue.

4. At the end of the session collect together the finished case studies and if at all possible arrange for them to be typed and duplicated so that they can be distributed to WM's for discussion on Day 5 - Session 1; a full day has been left between these two sessions in order to allow time for this secretarial work.

WM's may complain that they are being asked to write a case study with inadequate information and before the subject of case writing has been fully dealt with in the workshop; explain that cases always have to be written under time pressure and with inadequate information and that WM's will be in a far better position to appreciate sessions on case writing after they have had an actual experience of trying to put a case together themselves.

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 issue, 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 not 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."

Lecurer: "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 its 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 or 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?"

Day 4 - Session 2

HOW TO WRITE CASE STUDIES

Session Objective:	To enable WM's to write case studies based on data provided to them or data which they have previously collected.
Approximate Time:	2 hours
Materials:	Copies of case studies already used in the Workshop, and of any cases previously written by WM's

Note to Workshop Leader

As in previous session, WM's who have previously written case studies should be invited to share their experience with the rest of the group.

It is vital to stress that case studies can take many different forms; what is important is that they should be effective pieces of learning material, and not that they should conform to any pre-set standards.

WM's own previous attempts at case writing, or cases which they have successfully used in the past, should be used to illustrate the wide diversity of material which can be used.

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?

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.

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.

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

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,

Obviously the second method is more dramatic.

opening sentence more dramatic in cases where it is not.

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

It is perfectly reasonable to invent 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 not try to distort reality by overdramatising it.

Ask WM's what might be the effect of an over-simplified or over-dramatised 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 examples 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 skilfully 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?

ESLAMI'S COFFEE FARM

The Soto Coffee Growers' Society was formed in 1968 to take care of the coffee grown by farmers in the Soto area. The Society collects coffee beans from the farmers and delivers to the Coffee Marketing Board which then pays the farmers according to how much each has produced. In addition to handling coffee from the farmers, the Society also employs extension officers to advise members on how to cultivate their coffee in order to increase its quality and quantity.

Eslami is a member of the Society. On his 2 hectare plot, he has 700 coffee trees and his farm keeps him busy seven days a week throughout the year. He is assisted by his two daughters, who are in a primary school, and by his eldest son who is to sit his final examination this year in a nearby secondary school.

Eslami pays his family's living expenses and school fees from the money he gets from his coffee. He usually produces about 1,800 kilos per year from his trees and he knows he would have harvested even more were it not for the strange disease that often attacked the beans before they ripened. Nonetheless, the money he receives is enough to pay for his children's school fees and he has been happy about that. The Society used to pay 8 cents a kilo three years ago, but at present this has dropped to 6 cents.

At the last general meeting of the Society the Chairman had told the members that he had been asked to encourage farmers to expand their output because the country's quota in the international market had been increased. The Chairman had told them that it was very unlikely that the price would fall again in the near future. Shortly after this meeting Rajani, one of the extension staff, came to visit him. He praised Eslami for the work he had done on his farm, pointing out he had not only done a good job, but a service to the Society. Rajani then reminded him of the disease that for the last two years had attacked coffee berries. Up to now no one had known what this disease was or how it could be cured, but Rajani told Eslami that the Coffee Research Foundation had just sent the Society some information about the disease that was becoming a serious threat to poor farmers' incomes. This disease was apparently called 'C.B.D.' of 'Coffee Berry Disease', and could be cured by spraying the berries with a chemical that could be purchased from the Society's Head Office. In addition, Rajani pointed out that the Research Foundation had suggested that farmers should use something called fertiliser. He told Eslami that the effect of this fertiliser would be to increase the weight of the berries, and to make them ripen quicker.

The Research Foundation had given some details about the efficacy of the spraying and fertilisers. When spraying, 4 ounces of chemical had to be mixed with a tinful of water. Each tinful of the mixture could be used for about 25 trees and the cost of each ounce of the chemical was 7.5 cents. A pump would be needed which would cost $25. In addition, the farmer would need to buy a tin and a measuring spoon for 50 cents. Fertiliser was sold in bags at $6.50 per bag. Each bag would treat about 300 trees.

Rajani pointed out that the Research Foundation had discovered that 100 trees would yield 350 kilos if they were sprayed, and with the use of the fertiliser, the same trees would yield 400 kilos.

Rajani advised Eslami to use the new materials for his own sake and the Society's. He asked him to call at the Society's office if he needed any help. That evening, Eslami asked his son to calculate what it would cost him to use the new materials. When he saw the figures he asked him, "how can I pay your school fees if I pay all that amount?"

TOMASO AND THE NEW PYRETHRUM GROWERS' SOCIETY

In 1974 Tomaso was given a five-acre plot in the Calon settlement scheme. He allocated two acres to the growing of food for his family, and he used the other three to grow maize so he could earn money for his children's school fees.

At the beginning of 1976, a meeting was held in the local area and an agricultural officer told the farmers they could earn a lot more money if they planted pyrethrum as the main crop instead of growing maize. This was strange news to some people, but not to Tomaso. He had lived at one time in Razon, an area where pyrethrum is an important cash crop, and he knew a number of people who had become rich through growing and selling pyrethrum.

The agricultural officer gave the farmers the following information:

(a) The plants necessary to plant one acre would cost $35

(b) Each acre should yield 330 kilos of dried flowers each year

(c) The plants would have a productive period of five years

(d) Pyrethrum prices were guaranteed for at least five years

While all this was welcome news to Tomaso, there was one serious problem. He only knew one Pyrethrum Growers' Co-operative Society, which was in Razon. All the growers of pyrethrum he knew took their flowers there. The Society had operated for five years and during that time it had gathered so many members that the committee of the Society had decided to limit the number of members to 2,500. So, by the time Tomaso had the chance to grow pyrethrum, the Razon Society could not accept him as a member. The Calon Pyrethrum Society had however recently been started and its premises were near to Tomaso's plot. He knew that the Razon Society paid 45 cents per kilogram of dried flowers, while the newly-formed Calon Society paid only 40 cents. The Razon Society was adjacent to the railway station so that transporting the pyrethrum cost nothing. On the other hand, the Society in Calon was ten kilometres from the station and the transport cost was met by reducing the prices of each kilogram of flowers by 5 cents.

Tomaso asserted that only a good society like the one in Razon was worth trading with; the others, he said, were bad and managed by exploiters. He said that the deduction of 5 cents from each kilogram was a good reason to mistrust the Calon Society. He was determined not to grow pyrethrum at all if he could not be a member of the Razon Society, and he preferred this Society in any case because he could meet many of his friends there.

When Tomaso's brother Pedro, heard about this decision he was very annoyed. He knew that his brother was often rash and extremely emotional. He discussed it with him and Tomaso repeated his reason for boycotting pyrethrum, namely, that he could not belong to the Razon Society. Pedro asked his brother to give him some information about his activities on his plot the previous year and he reluctantly produced the following figures:

From the sale of maize from his three acres, he had earned $150
He had paid $15 for ploughing
He had paid $30 each for two weedings
Fertiliser had cost $8
Transportation of maize to the market had cost $18

When Pedro had considered the information for a time, he asked Tomaso if he had thought seriously about the prospects of growing pyrethrum. Tomaso jumped up and replied "You know, I am older than you! How can there be any advantage in growing pyrethrum if this Calon Pyrethrum Society is going to deny me 5 cents for every kilogram I sell them. It cannot work! Listen, my brother, I just cannot make a profit if I grow pyrethrum. See how great the costs are:

I shall have to pay $105 for the pyrethrum plants
$15 for the ploughing
$10 to the planter
$20 to the weeders and
$5 to the children who will pick my flowers

This is a fantastic cost and I cannot possibly afford it, particularly when I am robbed of my 5 cents by the Society."

His brother thought for a moment and reminded Tomaso that "a bird in the hand is worth two in the bush".

He told him that even if he could not take his pyrethrum to Razon, his earnings would still be greater than if he continued to grow maize. Tomaso listened carefully as his brother told him about the greater income from pyrethrum, but he still could not believe it.

Pedro went home very worried and he promised Tomaso that he would spend the night thinking about his brother's problem. Next day he hoped he could bring him some figures which might induce him to grow pyrethrum.

Day 5 - Session 1

DISCUSSION OF MICRO CASE EXERCISE 1

Session Objective:	To enable WM's to evaluate their own and each others micro cases and to use one or more as an actual piece of learning material.
Approximate Time:	2 hours
Materials:	As many as possible of the completed micro cases written by WM's should be reproduced and distributed to the group before this session.

Note to Workshop Leader

Initial discussion should focus on the following points:

1. What was the learning objective which WM's hope to achieve with their case study?
2. What data was lacking from the dialogue and how did WM's supply what was missing?
3. What particular problems other than lack of information did WM's experience when writing their micro cases?
4. What devices did WM's use to make their cases dramatic so that trainees could feel involved in the situation described?
5. Is each case study sufficiently informative, does it have a clear time sequence, is it clear with which person the student is meant to identify himself and how well does it achieve the stated learning objective?

If time allows one of the micro cases, or the sample case study provided with this session, the 'Co-operative Cattle Dip', should be used as the basis for a regular case study discussion.

It should be emphasised that the case study provided is in no way a 'model' nor does it represent the only or the best way in which a case study could be put together based on the dialogue.

This is merely one example of what might be done using the information provided and the WM's own attempts may be very different and a great deal better than this particular case study.

(Sample Case Study Based on Micro Case 1 Dialogue)

THE CO-OPERATIVE 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 agreed 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 2½ 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.

Day 5 - Session 2

ABDULLAH'S SUITCASE FACTORY

Session Objective: To enable WM's to learn from and evaluate a non-quantitative case study and to appreciate some of the problems of small-scale manufacture and of minority alien business people.

Approximate Time: 2 hours

Materials: Case Study - 'Abdullah's Suitcase Factory'.

Note to Workshop Leader

This is the last case study in the workshop which has been 'prepared'; all subsequent case studies will have been written by WM's themselves. It is therefore appropriate to introduce a rather different type of case study from those which have been used earlier; it may be taught by a WM or possibly by the WL.

Numerous issues are involved; the WL must ensure that excessive time is not spent on the following issues:

1. The alleged extortionate behaviour of the alien traders; the WM's should if necessary be reminded that the whole industry owed its origin to these and they were only behaving in a rational and economic way.
2. The previous errors of the individual suitcase makers; it is easy to criticise past errors but the group should appreciate that the individual businessmen reacted as most people would have done in these circumstances.
3. The mismanagement of the failed Co-operative; here again the mismanagement may not wholly have been the members' fault, and the focus of the discussion should be on what should be done <u>now</u> rather than on what was done wrong in the <u>past</u>.

Discussion of this case study as a piece of learning material may focus on the following questions:

1. Is there sufficient information to enable trainees to come to a definite conclusion?
2. Does the omission of quantitative data made a discussion more or less useful for learning?

3. Is there a need for more technical information on the ways in which the products were manufactured?

4. Is the introduction of Salim and of Abdullah as one representative of the suitcase makers artifical and does it detract from the real issues involved?

ABDULLAH's SUITCASE FACTORY

"I am like an animal in a trap; whichever way I turn I find that the way is blocked; tell me, Salim, how can I break out and build my business?"

Salim wished he could help but he could only agree that Abdullah seemed to be in an impossible position.

Salim's job was to encourage the formation of Co-operatives by small-scale business people and when he had first met Abdullah two years ago a Co-operative Association of some sort had seemed to be the ideal solution. There were about thirty suitcase makers in Abdullah's village. They each employed four or five relatives and they used their homes as workshops. They made a fairly wide range of modern designs; these included canvas holdalls and airline bags, black simulated leather attache cases and a number of different sizes and designs of suitcases. The products were of a very high quality, and the whole industry was a rather unusual example of a traditional family-based activity producing well designed modern products which could be sold anywhere.

The difficulty, two years ago and today, arose from the way in which the suitcase makers bought their supplies and sold their finished products. Nobody knew how the industry had started in the village but there was no doubt that it was now firmly under the control of two or three alien traders who were in business in the city nearby. Each suitcase maker was nominally an independent businessman, but they were in fact completely dependent on and controlled by these traders.

Most of them had started with a few hundred dollars of their own capital; the alien traders had originally encouraged the villagers to go into business; they had shown the village people what to make and how to make it, and they had themselves supplied the materials on credit where necessary. The suitcase makers were sure of a ready market, so long as the suitcases were properly made; all they had to do was to make up the appropriate number and types of cases from each batch of material. The traders' representative would come to the village to inspect and collect the finished cases, and would pay the makers in cash, less any amount outstanding for the raw materials.

The margin between the cost of the materials and the price of the completed cases was enough to pay a living wage to those who worked on the cases, and as time went on the suitcase makers had nearly all become used to buying their materials on credit; the few simple templates and tools were often lent to the manufacturers free of charge, and there seemed to be little point in tying up their own money in raw materials when they could obtain credit with no difficulty.

This had all appeared to be satisfactory, but about four years ago the situation had gradually begun to change. The traders claimed that modern mechanised suitcase factories were competing with the home-made products; they said they had to retaliate with lower prices and by offering credit to their customers, and this meant that they could not afford to be so generous to the village manufacturers. Since the colours, designs and so on were always changing, it was not possible directly to compare the costs of raw materials and the prices paid by the traders over time, and rapid cost inflation made comparisons additionally difficult. It did appear, however, that the margin between the two was shrinking in real terms, and a number of the villagers had to draw on whatever savings they had to help pay their daily living expenses.

Abdullah, and one or two other of the more enterprising villagers, were dissatisfied with these conditions and they had tried to bypass the traders in various way. Abdullah had first tried to find other sources of supply for the materials. This was very difficult, since so many different items of specialised plastic sheeting, hinges, locks and so on were needed, and he had found that his own needs were so small that no supplier was willing to supply him even for the same price as the traders, and none would give him any credit. He suspected that these suppliers were often in close touch with the alien traders, but he had no way of contacting similar firms in other areas.

Abdullah had then tried to find new ways to sell his suitcases; this was very difficult; cases of this type were either exported or were sold by specialised retailers in three of the city markets. Abdullah had managed to trace one of the exporting firms, but they had offered even lower prices than the existing traders and had demanded six months credit in addition.

Abdullah had also offered his suitcases to some of the retailers in the markets for rather higher prices than those paid by the traders. At first this was encouraging; one or two had bought a few cases for cash, but when Abdullah returned with further supplies they had insisted on far lower prices, and credit as well. Abdullah gathered that the established traders were willing to sell suitcases to these traders at a large loss for a brief period, in order to prevent him from bypassing them but there was nothing he could do about it.

The traders were obviously aware of what Abdullah had been trying to do, and they had been particularly critical of the quality of his products after he had been trying to sell elsewhere. They implied that unless he 'behaved himself' they would refuse to buy from him at all, and Abdullah knew that they could easily obtain all they wanted from other villagers.

Salim had first met Abdullah at this time; he also spoke to a number of other villagers, and found that their experiences were the same. The traders always countered any attempt to raise prices by playing the villagers off against another, and Salim had at once recognised that if the villagers combined their forces they could resist and bypass the alien traders. He pointed out to Abdullah and others that if they were to buy their materials as a group, they would place large enough orders to justify low prices and generous credit. They could also sell as a group, and maybe even set up their own retailing and exporting organisation.

The village people had seemed to be enthusiastic, and Salim had suggested how they might form a Co-operative. Abdullah and five others were elected as a Committee, and the nephew of one of the Committee members was appointed manager. Twenty five of the thirty suitcase makers agreed to join, and they each put up $20 to pay for the manager's salary until the Co-operative should start to pay its way. They also lent the manager a number of different suitcases and bags, so that he could start to investigate new sources of supplies and new customers.

Salim had been called to another district at this time; now he had returned hoping to find a flourishing Co-operative as a result of his initial suggestion. He was doomed to be very disappointed.

Abdullah had told a sad story of mismanagement, frustration and dishonesty; the manager had said that he must make several long journeys to obtain alternative suppliers and customers in other districts beyond the reach of the alien traders. He had been away for increasingly long periods, and after six months he had failed to return at all. His uncle, who was on the Committee, reported after a long delay that his nephew had failed to make any useful contacts in spite of hard work, and since the money was exhausted he had disposed of the samples and taken a job in the capital city five hundred kilometres away. Abdullah told Salim that some people thought that the manager had been bribed by the alien traders, but there was no proof of this.

Soon after the formation of the Co-operative the alien traders had voluntarily suggested that the villagers should start to buy their material supplies direct from three other firms since they no longer wished to bother with this job. The prices were at first slightly lower, but recently the situation had become far worse than before. Abdullah had said that the traders had started to insist on paying for the cases not in cash but with three or six months post dated cheques; the three raw material suppliers were the only firms or individuals who would accept these cheques and they insisted on deducting five, ten or even fifteen per cent from the face value. This meant that the raw materials were that much more expensive; there did not seem to be any alternative suppliers, and in any case, the villagers had used up any surplus cash they had to finance the unsuccessful Co-operative and to pay for their own food and clothing.

Salim tentatively suggested that they might try another Co-operative, with rather better organisation.

"Listen" said Abdullah, "I said that I was like a trapped animal, but at least I can learn from my mistakes and so can the rest of us. If you want to remain friends with people in this village, please never mention the word 'Co-operative' again."

Day 5 - Session 3

HOW TO SELECT, RECRUIT, AND RESEARCH CASE STUDY SUBJECTS

Session Object:	To enable WM's to select appropriate subject organisations, to persuade them to assist and to carry out the necessary research within the organisation.
Approximate Time:	2 hours

Note to Workshop Leader

If the workshop is to be run in two parts with an intervening period for case study research and initial writing this session will conclude the first part. The emphasis of the session will depend on the extent to which case study subjects have previously been identified and recruited for the WM's. If this difficult task has already been carried out, the session should concentrate mainly on the techniques of case study research, and on answering WM's queries and uncertainties about the work they are about to undertake. If on the other hand WM's will have to find their own subjects, and persuade them to assist, before getting down to the research, the sections on subject selection and recruitment will have to be covered in full. It is important to remind WM's that the workshop should only be the beginning of their case writing activity; they should therefore have some instruction to enable then to write cases on their own in the future even if they are being considerably assisted in this instance.

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

Ask WM's to suggest examples of organisations which would or would not conform to these criteria. What difficulties might arise with trying to persuade those that would conform actually to co-operate with a case writer?

1. The organisation should appear likely to be willing to co-operate since it is very easy to waste time persuading Co-operatives 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 writers should not only look for dramatically successful or unsuccessful organisation; every organisation has successes and failures 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

Ask WM's to suggest examples of dramatic failure or success in Co-operatives and ask them why these would not necessarily be good subjects for case study.

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

WHEN TO WRITE CASE STUDIES

Case studies should be written:

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?

Ask WM's how much time they are likely to have available for case writing during their normal jobs. Will opportunities for writing cases occur necessarily when they are preparing a new course?

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, a 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 piece 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 fulfil a particular training role may artificially exclude from the description other aspects which are not directly related to the training course.

Are Co-operative Management trainees usually training to be marketers, personnel officers, accountants or in fact general managers?

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 fulfil 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.

Refer back to case studies used in this workshop which appear to have been written in a hurry.

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.

Ask WM's why it may be better for instructors to use cases which they have not themselves written.

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.

RECRUITING 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?

Ask WM's to suggest what may be in a subject's mind. Ask them to suggest ways of overcoming each of these possible objections.

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.

Ask WM's how making a sale in a commercial sense differs from persuading a Co-operative to work with a case writer.

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 bona fide 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.

Ask WM's if their superiors are willing to introduce them to subject organisations; how can they be persuaded to do this?

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.

Ask WM's what problems may arise if subjects attend case study sessions.

5. The case writer should point out that the organisation will be making a valuable contribution to improved Co-operative Management and thus 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 informative 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.

Ask WM's how a non-disguised case study can be a useful form of publicity for an organisation.

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 reponsible official that the case writer has taken time to do some 'homework'.

Ask WM's what may happen if the case writer goes into the subject's organisation knowing nothing whatsoever about its origins, membership, activities and so on.

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.

Ask WM's how long they think it takes to obtain information necessary for a case study similar to those they have already used. (Two or three hours may be enough)

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 a 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 skilful combination and manipulation of figures; case study subjects may be reluctant to give information either because they do not know or because they are unwilling.

Give examples from local processes of different ways of obtaining the same basic data. (e.g. total value of coffee sold per year OR average amount of coffee produced by each member times the net selling value per final amount produced).

If the case writer shows that he is able to obtain the information on his own the case 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 meetings when he promises, he must not allow the case research to interrupt the important business of his subject and he must produce drafts, outlines or any other material when the case study subject asks for it.

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

Ask WM's whether the Co-operative Managers whom they are likely to approach do in fact have subordinates who could information for a case study.

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.

Day 6 - Session 1

THE PRESENTATION, DISGUISE AND RELEASE OF CASE STUDIES

Session Objective:	To enable WM's to organise the effective presentation of their case studies, to disguise them effectively if necessary and to secure their release from the subject organisation.
Approximate Time:	2 hours
Materials:	Examples of Case Studies illustrating different methods of presentation.

Note to Workshop Leader

Case studies, like any other written material, depend on the way in which they are laid out almost as much as on their composition. Clear presentation of tables and other exhibits can make the difference between an effective and an ineffective case study, and examples should be used to show that this can be achieved without expensive printing or other special facilities. WM's may object that the typing and reproduction services in their home institutions are of a low standard, but they should be shown that it is their responsibility to show inexperienced secretarial staff how to lay out case studies, and to press for higher standards of printing and duplicating. It may be possible to demonstrate what can be achieved by showing good and bad examples of layout and reproduction using the same staff and equipment.

The case study on the Majur Dairy Farmers' Co-operative Society, (P.186) may be used for this purpose.

THE PRESENTATION, DISGUISE AND RELEASE OF CASE STUDIES

The Micro-Case sessions have provided some practice in the actual writing of case studies; 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 presented 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

Show WM's how similar information can be presented in different ways. Refer to case studies already discussed for example of narrative presentation of figures as opposed to tabular 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.

Discuss alternative ways of presenting the information in case studies already used in the workshop.

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?

Ask WM's whether they think that figures should be put at the end of the case studies or included in the narrative. What are the advantages and disadvantages of each method? Stress the fact that decisions of this sort are vital for the success of the case study.

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 intermingled 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;

Ask WM's whether they wish to train people to search out data or to make use of data which is already available.

if trainees are intended to analyse the data which is already available then it should be presented as clearly as possible.

3. Should irrelevant data 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

Every 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 up 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 relevant and are available.

   Ask WM's for examples of visual enhancements which might have been used to improve the case studies already discussed.

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.

   Refer back to the 'Micro Case' session; could taped dialogues of this sort be used to make case studies more realistic?

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 must 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.

ACCURACY

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

Show the effects of small figure errors by reference to earlier case studies.

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

DISGUISE

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

Ask WM's what benefits might accrue to an organisation if it was known that they had co-operated in the writing of the case study.

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.

Ask WM's to suggest name changes which would effectively conceal the part of the country where the real organisation was located.

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 date need not be given at all.

Product and Process

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.

Ask WM's to suggest crop changes which can be made without altering the basic seasonal or processing factors

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 x 0.8 rather than x 2 or x 4.

Which will be the more effective disguise?
Sales x 2 or sales x 1.2?

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 other 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 the 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'

Ask WM's to suggest organisations for which each type of release would be appropriate.

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.

Ask WM's how willing subjects with whom they are familiar have been to contribute to the actual 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.

Day 6 - Session 2

MICRO CASE EXERCISE 2 and DISCUSSION

Session Objective: To enable WM's to have further practice in writing cases based on a brief dialogue and to discuss the problems involved.

Approximate Time: 2 - 4 hours

Materials: Tape of Micro Case 2 dialogue, or copies of transcript, writing materials.

Note to Workshop Leader

This first session should be handled in the same way as Day 4 - Session 1; a similar dialogue is provided which should be played on tape or by 'actors' selected from WM's or elsewhere. If sufficient time is available the WM's completed micro-cases should as before be reproduced and distributed for discussion; if time is not available for this they should be given sufficient time to produce at least first drafts of their own cases; the sample case based on the dialogue should then be distributed and WM's can discuss the way in which they approached the task of writing a case study and compare it with the sample.

If at all possible two sessions at least should be devoted to this second micro case so that one of the case studies can as before be used as a basis for class discussion led by the WL or one of the WM's.

This session is intended to remind WM's who are about to proceed to the final writing of their own case studies that there is no need for an elaborate or lengthy presentation; they should aim to produce not a comprehensive and all -inclusive account of the situation they have studied so much as a useful piece of learning material.

TRANSCRIPT OF A DIALOGUE BETWEEN A SUBSISTENCE POTATO FARMER AND A CO-OPERATIVE MANAGEMENT LECTURER.

Lecturer: "Good afternoon. I notice that a lot of farmers around here are starting to grow pyrethrum."

Farmer: "Yes, but I think I shall stick to potatoes."

Lecturer: "Don't you think you could make more money by growing pyrethrum like so many of your neighbours?"

Farmer: "You know, we have a saying around here; 'a bird in the hand is worth two in the bush'."

Lecturer: "Surely you could grow pyrethrum flowers just as well as you now grow potatoes?"

Farmer: "I have never grown anything like that and I don't know what would happen if the crop failed. I only have a very small five acre plot here and it has taken me twenty years to clear it and bring it up to its present condition."

Lecturer: "How many potatoes do you grow each year?"

Farmer: "Well I have five acres here; I get two crops of around fifteen bags an acre every year."

Lecturer: "Do you sell all these?"

Farmer: "Yes, or most of them at any rate. I have a small garden near the house and the potatoes I grow there are eaten by my family."

Lecturer: "What do you get for the potatoes?"

Farmer: "I usually sell then for $1.50 a bag and I have to pay somebody five cents a bag to get them to the main road eight kilometres away."

Lecturer: "Do you have people to help you?"

Farmer: "Oh yes, my two wives give me a hand when they can and five of our fifteen children spend most of their time every day working on the land."

Lecturer: "What about your other children?"

Farmer: "Well my five older children never went to school because of the trouble during the independence struggle. The other ten are at school and it's their school fees that I'm worried about."

Lecturer: "Surely if you grew pyrethrum you would be able to afford to pay their school fees and have something over?"

Farmer: "If everything went well I would perhaps, but I am just getting by now; I don't want to take on anything new that I don't know about."

Lecturer: "Does the Government give you any help at the moment?"

Farmer: "Oh no, all they do is tell me to grow this new crop. I think they should help us to sell our sweet potatoes for more money but they have never done anything to help us like that."

Lecturer: "Do you know what would be involved in growing pyrethrum?"

Farmer: "Oh yes, I would have to get 45,000 plants and they would cost five cents for ten. That sounds like a lot of money to me."

Lecturer: "What would you sell them for?"

Farmer: "Well my friend tells me that this new Co-operative pays $12.50 for a bag of flowers."

Lecturer: "How many bags would you get off your farm?"

Farmer: "Well the Extension Officer told me, and I must admit my friend agreed, that I would get about ten twenty kilogram bags of flowers for every acre."

Lecturer: "That sound quite profitable to me. Would you have any other expenses?"

Farmer: "Oh yes, I would have to pay ten cents for every bag to get them to the Co-operative and I would also have to pay two cents for drying the flowers."

Lecturer: "Have you worked out what all this would cost and whether you would make more money than you do at the moment?"

Farmer: "No, I haven't really bothered. I suppose one of my children who is at school could do this for me but really I don't want to know any more about it."

Lecturer: "Why not?"

Farmer: "Well, the Government seems very anxious to get us to grow this pyrethrum and this makes me suspicious."

Lecturer: "Don't you think that they are doing it in your own interests?"

Farmer: "Well they may be, but I was brought up on potatoes and I believe I know how to grow potatoes. I don't like being told my job by anyone else and I want to carry on as my father and my grandfather did before me. What was good for them is good enough for me."

(Sample Case Study Based on Micro Case 2 Dialogue)

SALIM's POTATOES

Salim is a small-scale farmer in a settlement scheme. Soon after independence, he was awarded a five-acre uncleared plot, which lay some eight kilometres from the all weather road, which was the best in the area.

The people in his locality have grown sweet potatoes from time immemorial. Two harvests can be obtained from the plant each year and the market price is $1.50 a bag. In addition, Salim had to meet the transportation costs of 5 cents a bag for transporting the crop to the main road. The purchasers buy the sweet potatoes and transport them for resale in the City Market. When Salim fails to sell the potatoes to these traders, he has no other place to sell his produce. The suggestion that a Sweet Potato Board should be set up by the local council was ignored by the Government.

Salim and his two wives have fifteen children, ten of whom are of school age. The five older children never went to school because their father was in detention. Every member of the family works on the land; they had to work from 8.00 a.m. to about 6.00 p.m., and each acre gave a yield of 15 bags twice a year.

Habib, Salim's best friend, was employed on a large farm one mile away from Salim's plot where pyrethrum was grown. Six months after planting, this crop could be picked every three weeks. A new Co-operative had been set up to help new small-scale farmers to attain financial success. Pyrethrum is light and even Salim's eight year old son could carry a few kilos of flowers to the dryer on the neighbouring farm. Habib listed the costs of growing the crop as follows:

1. Two cents a kilo for drying. He anticipated the total output to be 200 kilos an acre
2. Ten pyrethrum plants cost 5 cents. Salim's plot would need 45,000 plants
3. For every 20 kg of dried flowers delivered to the Board's station, 10 cents would be deducted to meet the transportation costs.

"The Board", Habib said, "always pays $12.50 for one bag of dried flowers." He wanted his friend to stop growing sweet potatoes and start growing pyrethrum. He was sure that Salim would get more money which he could use to send his children to school. The Government had hinted that it would award title deeds and the services of trained agricultural staff to the new farmers who would start growing products formerly grown by the Colonialists.

Salim did not welcome the idea of growing a crop whose origin, use and requirements he did not know. He had been brought up on potatoes and, as he grew older, potatoes and maize. He was convinced that he was a good potato farmer. He did not like the idea of his land being visited by these men in khaki who would ask him numerous questions about a crop whose growth only nature could explain. He wanted peace in his plot, and would prefer to continue to grow his grandfather's crop.

Day 6 - Session 3 and Day 7 - Session 1

WORKSHOP MEMBERS' CASE WRITING

Session Objective:	To enable WM's to complete the writing of the first drafts of their own case studies based on data previously collected.
Approximate Time:	As long as can be made available
Materials:	WM's own notes and other data previously collected.

Note to Workshop Leader

These two sessions and one evening, or a total of approximately six hours, have been set aside for WM's to produce the first drafts of their own case studies. This is almost certainly insufficient time and WM's should be able to work during the week-end in the middle of the workshop if it is run over a continuous two-week period.

It is preferable if more time is available to allow longer time for case study writing and the WL should be available to WM's to give advice and assistance on an individual basis at all times.

The first WM's cases are not scheduled to be discussed until Session 3 on the following day; it is vital that typing and reproduction facilities should be available during the evenings if necessary so that at least two case studies will be typed and distributed to WM's at least by the beginning of Session 2 on the following day. Subsequent case studies must be typed and reproduced ready for distribution in time for all WM's to study them the day before they are scheduled to be discussed in full session. This may involve extra secretarial assistance and other inconveniences but it is vital for the success of the workshop that these functions be properly carried out.

WM's should have started work on their own case studies before this time and should have received individual guidance and assistance from the WL during their first efforts to write a completed case study.

Day 7 - Session 2

WORKSHOP MEMBERS' PREPARATION

Session Objective:	To enable WM's to read, analyse and prepare for discussion the cases scheduled for the following session.
Approximate Time:	2 hours
Materials:	WM's case studies to be discussed in Day 7 Session 3

Note to Workshop Leader

A complete session is allocated to preparation in order to ensure that the first two WM's cases are properly prepared and also to demonstrate to WM's that all case studies must be thoroughly prepared during the evenings from now onwards. This means that on the evenings of the seventh and eighth days, WM's will have to prepare four case studies if the workshop is scheduled as is suggested. This will involve a considerable amount of work and it may be appropriate for the group to be split for preparation and also for discussion of the cases. This will allow a longer period both for preparation and discussion although it will prevent WM's from learning from the full range of cases which they themselves have produced during the workshop.

Alternatively certain WM's may be given the task of preparing a detailed analysis and presentation on each case study while others may be asked merely to read it and study it briefly. It is vital for proper testing and learning that a number of WM's should have studied each case study in some depth.

Day 7 - Session 3

WM's TEACH THEIR OWN CASE STUDIES

Session Objective:	To enable WM's to test their own case studies and to learn from the teaching of their colleagues.
Approximate Time:	2 hours
Materials:	Copies of Case Studies to be taught, Evaluation Forms (pp. 159, 160)

Note to Workshop Leader

This session, and the following sessions on Day 8 Sessions 1 and 3, Day 9 Sessions 1 and 3 and Day 10 Session 1 are allocated to WM's teaching their own case studies.

It is vital that the cases should have been typed and reproduced in advance so that every WM has time to prepare each of the cases before they are discussed by the group as a whole.

The number of sessions and the time devoted to each will obviously depend on the number of WM's but it is vital that every WM, however poorly prepared his case study is, should have the opportunity to attempt to teach it to the remainder of the group.

The order in which WM's present their cases is important; this first session should probably be started by a rather above average WM whose case study is ready in plenty of time. The sequence of following sessions should be carefully selected so that the less experienced WM's are preceded and followed by those who are likely to more confident; while no WM should be allowed to omit his own session, every one should be encouraged to assist and support his colleagues when they are having difficulties.

Time must be allowed at the end of each case session for evaluation both of the case study and of the way in which it was taught. This may mean that each case has to be taught in as little as thirty minutes but inexperienced WM's will prefer a brief session. Since the major objective is to test the cases, this should be sufficient for major omission and errors to be identified.

If more time is available however, it should be used, since the ideal situation is for each WM to have one hour to teach his case study and half an hour for discussion of the case and the way in which he taught it.

The discussion of the teaching should if possible be led by the WM himself; he should be asked to state exactly what he was trying to achieve and whether he thought he had achieved it; he should also be expected to initiate the discussion into ways in which the case study should be improved.

The WL should take careful note of all improvements which appear to be necessary and should be sure to discuss these individually with WM's after the sessions so that every WM is sure of the improvement which he must make before his case study is ready for publication.

Day 8 - Session 1

WM's TEACH THEIR OWN CASE STUDIES

Session Objective: To enable WM's to test their own case studies and to learn from the teaching of their colleagues.

Approximate Time: 2 hours plus

Materials: Copies of Case Studies to be taught, Evaluation Forms (pp. 159, 160)

Note to Workshop Leader

For content and structure of this session see *Day 7 Session 3.*

Day 8 - Session 2

OTHER LEARNING METHODS

Session Objective:	To enable WM's to choose the most appropriate learning methods for a particular learning objective.
Approximate Time:	2 - 3 hours or more.
Materials:	Examples of games, in-basket exercises etc. If possible copies of 'Participative Teaching Methods' published by ICA/CEMAS, should be made available to WM's before this session.

Note to Workshop Leader

The content and emphasis of this session must depend on the extent to which WM's are already using learning methods other than lecturing. If they are familiar with a wide range of methods, the session should concentrate on discussion of the various objectives for which each is suitable; if not, WM's should be introduced in this session to the learning methods they have not met before. They should be shown examples, and, if time allows, they should actually participate in a game, role play or other participative exercises. If there is sufficient time, this session, together with supporting examples, may be split into two or more separate sessions, since each learning method merits fairly detailed treatment and illustrations.

OTHER LEARNING METHODS

In earlier sessions we have mentioned that case studies are only one method of learning; now we shall briefly examine some of the other methods that are available so that we can see the case method in the context of the total learning process.

WHO IS IN CONTROL?

Traditional learning methods usually require that the instructor should be wholly in control of the learning situation; more modern methods, such as the case study, mean that some of the control passes into the hands of the trainees.

Ask WM's who has done most of the talking during this workshop. Who has been in control?

WHO IS INVOLVED?

Traditional learning methods often leave most of the activity to the instructor with the trainees largely playing a passive role; more modern methods like case studies require the trainees to participate actively and the instructor may only be speaking for a relatively small proportion of the time.

WHICH IS BEST?

These modern and participative trainee-controlled learning methods are not necessarily the best.

Trainees who are not used to active participation, or to controlling the learning situation themselves, find it difficult to become used to the modern methods and in any case the more traditional methods may be of greater value for achieving certain learning objectives.

It is important to choose the right learning method based on what you are trying to achieve. Many industries are being advised nowadays to select appropriate technology; they should not necessarily build large scale capital-intensive processing factories if less expensive plants which employ more people are more appropriate to their situation.

Ask WM's to suggest learning methods other than the case method and to identify their advantages and disadvantages. Ensure that they mention all the ones listed here, and introduce those which they omit.

In the same way the instructor must select the appropriate learning method for the needs of his trainees and the objectives he is trying to achieve.

PROGRAMMED LEARNING

Programmed learning is a method by which trainees can teach themselves by following a very carefully structured path through a given subject, which ensures that each step is grasped before the next one is started.

Ask WM's if they have experience of programmed learning and show them examples of programmed texts.

Advantages:

1. It is self-paced; the trainees can proceed at their own pace through material and slower or faster-than-average trainees do not become frustrated.
2. It can be decentralised; trainees can learn on their own and there need in fact be no instructor involved at all.
3. It is standardised; if a group of trainees have all completed the same programmed text the instructor can be sure that they have all grasped the same material.

Disadvantages:

1. It is very expensive to originate the programmes; if large numbers of trainees need the same instruction this is not a disadvantage but it is not usually practical for the programmed text to be produced for a small group.

2. It is unlikely to change attitudes; trainees can acquire knowledge but it is difficult for them to be motivated to apply this knowledge purely by learning it from a programmed text.

3. It is limited; there is no scope for the trainee to pursue lines of enquiry which occur to him independently since the programmed text ties him closely to the preselected subject.

READING ASSIGNMENTS

Many teachers assign reading to trainees to support lectures and many trainees try to improve their own skills through reading.

Advantages:

1. Large quantities of reading material on practically every subject are already economically available.

2. The trainee can proceed at his own pace.

3. The trainee can often pursue an independent line either in the same book or in others available to him.

Disadvantages:

1. There is no way in which the trainee can check that he has understood what he has read.

Ask WM's for their evaluation of the reading assignments which they had when they were studying.

2. Trainees may not be motivated to carry out reading assignments since it may appear that little has been achieved beyond the actual reading of a certain number of pages.

3. Most management texts relate to privately owned enterprises operating in industrialised economies. These may be irrelevant to Co-operative Management in primarily rural societies.

Ask WM's to comment on the relevance of management textbooks they have read.

LECTURES

This is the commonest form of learning and consists of a talk given by the instructor with little if any opportunity for participation by trainees.

Advantages:

1. A large amount of material can be covered in a relatively short time.
2. A large number of trainees can listen to a lecture.
3. The lecturer can to some extent evaluate his presentation and modify it according to the way in which the trainees are reacting. A lecture is a useful way of exposing the personality and ideas of a prominent individual to a large number of trainees.

Disadvantages:

1. There is little opportunity for feedback; trainees do not usually interrupt either to disagree or to say that they do not understand.
2. Trainees may not recall what they have heard; if they take notes they may not pay attention, and if they do not take notes they will not remember what has gone on.
3. Trainees will interpret what they have heard in their own way and they may draw quite different conclusions from those intended by the speaker.

Ask WM's to discuss their own experiences as lecturers or as trainees listening to lectures. Which sessions in this workshop have been mainly of the lecture type? Have they been the most effective ones?

CASE STUDIES

This learning method is of course the focus of the workshop and is therefore adequately dealt with in other sessions.

ROLE PLAY EXERCISES

Trainees act in the classroom the roles that they may have to perform in their work. Trainees are usually given a 'brief' which describes the Co-operative organisations in which they work and gives some outline details of the situation and the role they are to play but a great deal will depend on their own imagination.

Advantages:

1. Trainees actually experience what it is like to be in a real management situation.
2. The classroom situation involves little risk and trainees therefore can try out inter-personal strategies which they would not be prepared to risk in a real managerial situation.
3. Trainees can play the roles of those with whom they will have to deal in Co-operatives, and will thus come to appreciate the position of members, subordinates, Committee members and so on.

Ask WM's to suggest necessary skills which might be learned through role play exercises.

Disadvantages:

1. Role playing is of value only in learning inter-personal skills; it is not usually of any use when trying to learn facts or particular techniques.
2. Some trainees may be too shy or otherwise unwilling to act realistically in front of their fellow class members.
3. Because of nervousness or some other reasons, trainees may treat the role play exercise as a joke so that no real learning takes place.

EXERCISES

Trainees individually, or in groups, are given material which incorporates problems which they must solve and to which they must present a written answer. These may include calculations, 'in-basket' exercises where trainees have to deal with a typical collection of communications such as would be received by a Co-operative Manager, case studies for written analysis rather than for classroom discussion, essays and other assignments.

Ask WM's what different learning objectives might be achieved if case studies were set as written exercises instead of being discussed in the group.

Advantages:

1. Trainees are compelled actually to come to a conclusion and to commit themselves in writing to their opinion.
2. The instructor has the opportunity at his leisure to evaluate the trainees' understanding and can thus take remedial action if necessary.
3. Trainees can carry out exercises in their own time and thus not occupy the rather scarce classroom time or facilities.
4. If exercises are given to groups, trainees will be able to learn a great deal about realities of Committee work and doing things with other people.

Disadvantages:

1. If a trainee is at a loss he may not be able to obtain any guidance and may in fact complete the exercise wholly incorrectly and thus waste a great deal of time.
2. It is usually impossible to adapt exercises for individual trainees' abilities; some may find them too easy while they may be impossible for others.

3. The task of presenting an analysis, conclusions and so on in writing omits many of the inter-personal skills which are required of a real manager. Trainees may get the impression that a neat written report is all that is required when in fact members, Committees or other officials have actually to be persuaded about certain courses of action and this is more difficult than deciding what has to be done. Some trainees with a good academic background may perform well in written exercises but may in fact be less effective as real Co-operative Managers than those who have less facility with pen and paper.

Ask WM's if Co-operative Managers need training in report writing or in inter-personal skills of management. If both are required, which is the more serious training need?

GAMES AND SIMULATIONS

Trainees are given information about a Co-operative Management situation and are allocated different roles to perform. They have to make a decision as a group or individually and they are then given the results of these decisions and they have to make further decisions and to carry on the management in a way as close as possible to reality. There may be a competitive element so that one group or individual actually 'wins' by making a greater surplus, producing more output or some other achievement.

Advantages:

1. Trainees get a feeling for the reality of management and have to 'live with' the results of their decisions.
2. Trainees have the experience of working under pressure and come to realise that it is not enough to make the right decisions; they have to be made quickly particularly in a competitive market situation.
3. Trainees experience working under pressure in a group where tasks have to be allocated and agreement on action to be taken must be reached in a short time.

Disadvantages:

1. The gaming and competitive element of a simulation may be so enjoyable and stimulating that trainees do not actually learn anything about Co-operative Management.
2. Trainees may not be willing to treat the exercise as a realistic one and may believe that the inevitable artificial elements mean that the simulation is valueless.
3. A simulation or game requires very concise and careful preparation, organisation and management by the instructor if it is not to be a fiasco.

Ask WM's what experience they have had of playing or leading management games and simulation are games with which they may be familiar adaptable for Co-operative Management trainin

PROJECTS

Trainees individually or in groups are asked to carry out projects in the field and then to present the results both in writing and verbally to the rest of the group. The case writing project which makes up the major part of this workshop is an example of this type of learning device.

Ask WM's to suggest the advantages of the case writing project as a learning device. Would it be useless unless it was preceded and followed by group lecture and case study sessions? What are the implications for the structure of 'on-the-job' training?

Advantages:

1. Trainees may actually achieve something in writing a case study or solving an actual problem in a Co-operative which is of value in addition to what they learn while doing the project.
2. Trainees are forced actually to come in contact with the realities of Co-operative Management in the field.
3. Trainees have the opportunity to test what they have learnt in the classroom by seeing if it can actually be applied to a real management situation.
4. Trainees have the opportunity to act independently of the instructor.

Disadvantages:

1. It can be very time-consuming to identify and organise a project since Co-operatives and other organisations will be involved.
2. Unless trainees are interested in the subject matter they may not put in the necessary amount of work.
3. Projects can be very time-consuming if the trainees have not been allocated a great deal of time for their training.
4. If trainees fail on the project they may be discouraged and believe that the course as a whole has not been worthwhile or that they cannot be effective managers when their training is completed.

When all these learning methods have been identified and discussed ask WM's to rank them according to how instructor controlled or participant controlled they are. Stress that this is not an order of merit but relates to their appropriateness for various learning objectives.

WHICH METHOD TO USE

Which learning methods would be appropriate for each of the following groups and learning objectives?

Replace these examples with others more relevant to the training tasks of WM's if possible.

1. University students of economics require a general introduction to the Co-operative sector which will show them its importance in the economy of the country as a whole.

   (A combination of lectures and readings would probably achieve this objective.)

2. Newly elected Co-operative society committee members need to know more about how meetings should be conducted and about the rules of procedure.

   (A programmed course if one was available might be followed by a simulated meeting in order to check that they had understood and could apply what they had learned.)

3. A group of Co-operative Management instructors need to be taught more about how to teach and write with case studies.

   (A mix of case studies, lectures and projects such as has been adopted during this workshop is, we hope, appropriate.)

Ensure that WM's identify the learning methods used in this workshop and evaluate their use

4. A number of clerks need instruction in recording procedures in order to check members' produce correctly and make the necessary entries so that members are credited with the appropriate values.

   (If possible a programmed course can be used or simple case studies followed by exercises to check that the clerks have grasped the necessary principles and could apply them.)

5. A group of newly appointed Co-operative Extension Officers need to learn how to establish good working relationships with small-scale farmers in the field.

   (Case studies and role play exercises can be used to develop the understanding of small-scale farmers' situations and the necessary inter-personal skills for providing them with advice.)

Make these examples more realistic by using real co-operative names etc.

6. Co-operative Union Marketing Officers need training in the techniques of fixing prices which will be competitive and will still encourage production by farmers.

   (Lectures on the principles of pricing might be preceded and followed by case studies and a game could also be used to enable the Marketing Officers to see the effects of the kinds of decisions which they will take.)

Day 8 - Session 3

WM's TEACH THEIR OWN CASE STUDIES

Session Objective: To enable WM's to test their own case studies and to learn from the teaching of their colleagues.

Approximate Time: 2 hours plus

Materials: Copies of Case Studies to be taught, Evaluation Forms (pp. 159, 160)

Note to Workshop Leader

For content and structure of this session see Day 7 Session 3.

Day 9 - Session 1

WM's TEACH THEIR OWN CASE STUDIES

Session Objective: To enable WM's to test their own case studies and to learn from the teaching of their colleagues.

Approximate Time: 2 hours plus

Materials: Copies of Case Studies to be taught, Evaluation Forms (pp. 159,160)

Note to Workshop Leader

For content and structure of this session see Day 7 Session 3

Day 9 - Session 2

THE OBJECTIVES AND EVALUATION OF CO-OPERATIVE MANAGEMENT TRAINING

Session Objective: To enable WM's to set the appropriate objectives for training and to ascertain whether or not these have been achieved.

Approximate Time: 2 hours

Note to Workshop Leader

Specific objectives have been given for each session in this workshop. You should have discussed these, and attempted to find out whether they were achieved during each session. WM's should therefore by this stage be familiar with the need to set objectives; this session can now concentrate on how to set them and on evaluation.

THE OBJECTIVES AND EVALUATION OF CO-OPERATIVE MANAGEMENT TRAINING

THE NEED FOR OBJECTIVES:

"Why is training necessary?"

"What do we hope to achieve when we train people?"

"How can we justify the expense, time and effort involved in training?"

"How can we compare one form of training with another?"

"How can trainees and those responsible for training them find out whether training has been worthwhile?"

Ask WM's how they would answer such questions for themselves.

We are supposed to teach Co-operative Managers how to set objectives for themselves and their subordinates and how to check on the results.

If training is to be carried out in a systematic and organised way like any other aspect of Co-operative Management, we must ask questions of this sort and we must be able to answer them.

We can only do this if we know:

a) what we are trying to achieve
b) whether we have in fact achieved it

Learning objectives can be stated in a number of different ways. We may use the following words, and many others, in order to describe what we are trying to do.

knowing	teaching
learning	remembering
understanding	grasping
appreciating	applying
performing	improving

Ask WM's what they try to enable their trainees to do. List the verbs they use and try to elicit as many as possible of those listed here.

Consider the following situation; the Ministry of Co-operatives is concerned that Co-operative Extension Officers are recommending the establishment of Co-operatives without having properly studied their feasibility or otherwise beforehand. The Ministry has requested the Co-operative College to provide more training in order to remedy the situation. How would we state our learning objective when we are deciding how to respond to the Minister's request?

Ask WM's each of these questions and attempt to elicit from WM's themselves the types of answers which are given here.

We might state our objective in any one of the following ways:

"Our objective is to put on a course about feasibility studies".

"Our objective is to teach Extension Officers about feasibility studies."

"Our objective is to enable the Extension Officers to carry out feasibility studies."

"Our objective is to ensure that the trainees actually do feasibility studies in the field."

Which of these statements most accurately reflects the intentions of the Ministry?

Discuss this with WM's

Clearly the last one since only this relates to what the Extension Officers will actually <u>do</u> as a result of the training if we achieve our objectives.

Which of these statements will be the most easy to evaluate?

Clearly the first one since when the course has taken place we can safely say that it has in fact been achieved.

This reflects the major difficulty about setting objectives and evaluation of training; the more closely related the objectives are to what is actually required the more difficult it is to evaluate them.

B. Consider the following situation:

The management of a Co-operative Union is concerned that their member societies are not managing their transportation activities correctly. Among other failings, Primary Society Managers do not keep proper records either of the use to which vehicles are put or the expenses incurred by each vehicle.

Replace this and other examples with more locally relevant situations if possible.

Why might this be occurring?

1. The managers may not know how to keep proper records for a transport operation.
2. The managers may know the techniques but may be unable to apply them to their particular situation.
3. The managers may know how to apply the techniques but they may be unwilling to apply them for any one of a number of reasons.

Ask WM's to suggest possible reasons for this failure.

Before undertaking any training to remedy this situation:

1. Find out exactly why it is that the managers are not keeping records.
2. Ensure that the reason or reasons are such as can be affected by training since nothing is more frustrating than trying to train people to do things which they cannot do because they do not have the time, the facilities or because they are prevented by their superiors.
3. Determine exactly what training objectives we shall need to achieve.
4. Decide what kind of training is needed and how long it must take in order to achieve the objectives.
5. Decide how to ascertain whether or not the objectives have been achieved.

Ask WM's whether Co-operative Management failings are usually due to lack of knowledge, skills or the correct attitudes.

THE PROBLEMS OF EVALUATION

How can we ascertain whether or not we have achieved our training objectives for the Extension Officers or the Society Managers?

Use specific examples known to WM's if possible.

There are a number of different techniques whereby trainers can evaluate the success or otherwise of training:

1. They may set tests or examinations; trainees may be asked to list the steps necessary to carry out a feasibility study or to illustrate the layout of a form for recording vehicle jobs and expenses.

2. The trainer can informally evaluate what he is achieving by observing the response of trainees during the course itself, by noting their questions and by introducing participative learning methods partly in order to ascertain what has been achieved at each stage.

3. Trainees themselves if suitably encouraged can provide useful information by telling the instructor what they have learned and more importantly by indicating where they do not understand. It is vital that trainees should feel free to do this even if they appear to be critising the instructor.

Ask WM's to look back at the sessions in this workshop; have they always let the WL know if they have not understood something?

4. The instructor may set case study exercises or other practical tests which will test whether or not the trainees are able to select appropriate techniques and to apply them, in writing, to an actual situation. This is clearly more effective than an examination which merely asks trainees to list or recite certain facts or procedures.

Ask WM's whether the examination questions which they have had to answer really test their ability to <u>do</u> anything at all.

5. The instructor may try to find out from the trainees' supervisor whether their performance has improved or not as a result of the training. This may involve problems of confidentiality; if

trainees know that their instructors are in touch with their supervisors this may destroy the relationship of trust and confidence which is necessary for successful learning.

6. The instructor may attempt to find out from the trainees themselves how their performance has improved as a result of the training.

7. The instructor may try to ascertain what has been achieved by objective measurement of results; the instructor may try to find how many more feasibility studies are being carried out by the trainees after the course or how many more primary societies have proper vehicle recording systems after the course when compared with before.

Ask WM's which evaluation techniques they use themselves. How effective are they?

WHY EVALUATE?

Before deciding on the method or methods of evaluation it is important to be clear why we are evaluating training.

The traditional reason for evaluating training is to judge the efforts of the trainee and possibly to award certificates, entry to further training, degrees etc.

Co-operative Management training should not primarily be concerned with certificates and awards; these symbols may be used as a record of achievement or as a motivational device but the major objective is to improve.

Ask WM's how trainees usually display course certificates; in what way are the certificates actually related to improved performance?

If the evaluation shows that trainees have failed to achieve the objectives what is the traditional reaction of the instructor?

"These trainees are unintelligent and therefore they have failed the course."

What should be the reaction of the instructor?

"I, the instructor, have failed to achieve my objectives since the trainees have not learned what I set out to teach them."

Ask WM's how they react when their trainees fail to learn anything. How did their teachers react at school and elsewhere?

How should the instructor react to his own failure to achieve his objectives?

1. He may re-examine his objectives to ensure that they were reasonable and achievable.
2. He may re-examine his selection procedures to ensure that he has been selecting the appropriate trainees
3. He may re-examine the teaching methods he used to ensure that they were the most appropriate ones to achieve the objectives.
4. He may re-examine the time spent on training to see whether this was sufficient.
5. He may re-examine the quality of the teachers (including himself) and the material which was used in the course.
6. He may re-examine the working environment of the trainees to ensure that they were not prevented from achieving the objectives by circumstances beyond their control.

Generally, he should improve the training rather than blaming the trainees.

Day 9 - Session 3

WM's TEACH THEIR OWN CASE STUDIES

Session Objective:	To enable WM's to test their own case studies and to learn from the teaching of their colleagues.
Approximate Time:	2 hours plus
Materials:	Copies of Case Studies to be taught, Evaluation Forms (pp. 159, 160)

Note to Workshop Leader

For content and structure of this session see Day 7 Session 3

Day 10 - Session 1

WM's TEACH THEIR OWN CASE STUDIES

Session Objective: To enable WM's to test their own case studies and to learn from the teaching of their colleagues.

Approximate Time: 2 hours plus

Materials: Copies of Case Studies to be taught, Evaluation Forms (pp. 159, 160)

Note to Workshop Leader

For content and structure of this session see Day 7 Session 3

Day 10 - Session 2

EDITING AND REVIEW

Session Objective: To enable WM's to identify the improvements that are necessary to their case studies and to commit themselves to carrying out these improvements by a specified date.

Approximate Time: 2 hours

Materials: Each WM should if possible have a copy of all of the draft case studies which have been produced during the workshop.

Note to Workshop Leader

It should have been possible to discuss every case study with its author immediately after the session in which it was taught, while the need for alteration was fresh in the writer's mind.

This session is intended more as a reminder of the type of changes which have been found to be necessary, and, perhaps more important, as an opportunity for WM's to commit themselves publicly to the necessary editing and rewriting.

There is always a danger that after a workshop of this sort the initial enthusiasm quickly wanes, and nothing may be produced in the end. It is therefore vital both that the sponsoring insitution reaffirms its commitment to publication of the collection of cases and that each WM realises that if he fails to complete his study in time he will be delaying or preventing the complete publication.

It is important to avoid focussing too much criticism on those WM's whose case studies need the most attention; every case study can be improved, and it may be that the less experienced WM's can be informally assisted by those with less modification to do on their own cases. If necessary the revision can be carried out by the WL or a third party, but this should be avoided if at all possible since the task of revision is an essential part of the writing exercise.

EDITING AND REVIEW

By this stage every 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.

Ask WM's to identify aspects of their cases that need improvement; remind individual WM's where a particular improvement is necessary for their case study.

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 forgot 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 not 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 <u>what</u> has happened <u>when</u>.

Identify individual case studies which need attention in each particular way.

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 lead 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.

If appropriate remind trainees that they are responsible for "clearing" their completed case studies with the subject organisation.

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 the 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 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.

If necessary and practicable the WL should have advised the employing institutions of WM's that it will be necessary for them to spend some time after their return from the workshop editing and improving their case studies.

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 Institution where this workshop is based and from where the collection of case studies will be published.

Fix a date by which all WM's will be expected to have returned their edited and improved case studies. Allow for postal delays and it may be necessary to build in some time to allow for unexpected problems and over-enthusiasm of WM's prior to their return to their places of work.

PUBLICATION

As was stated from the very beginning all the case studies which are edited and improved up to a reasonable standard will be published and made available to Co-operative Training Institutions throughout the world which are in desperate need of material of this sort.

WM's will be making a major contribution to Co-operative Management training if their cases are included; the WL's and, it is hoped, supervisory staff in WM's employing institutions will be willing and ready to help where necessary. If case studies are not adequately improved, or if they do not arrive in time, they will have to be omitted from the published collection.

If WM's promotion prospects are to any extent determined by publication record it may be reasonable to point out that omission would be a serious blow to career prospects.

FURTHER CASE STUDY WRITING

It is vital that WM's should continue to write case studies and that they should not consider that this case study in this workshop is the sole result of their participation.

They should have seen that case studies need not be lengthy and that it is really quite easy to write a useful piece of training material based on a fairly simple conversation and a rather limited amount of data.

There is no reason not to use imagination; every learning objective which is met with by WM's should be examined and if a case study appears likely to be a useful method of achieving the objective a case study must be found.

SHARING OF CASE STUDIES

There are international 'case clearing houses' which have been set up in many countries to provide a listing and distribution service so that anyone can obtain copies of case studies for a very reasonable charge.

If a locally accessible case clearing house or similar organisation is available its service should be described here and the collected case studies should be submitted for inclusion.

Case study writers do not receive any payment for allowing their case studies to be included in these listings nor are they rewarded according to the number of times their cases are used. Most trainers are only too glad to see that their training material is of use elsewhere.

Even if no national organisation is available it should be possible to make up a list of the available Co-operative Management case studies and for one individual to act as a secretary. All those interested in producing case studies should send him whatever they write; submission should be accompanied by a brief indication of the subject matter and learning object which can be achieved by using this case study. If the case study list is kept up to date and copies are circulated every six months or a year then it will be possible for all interested instructors to share in and gain from the efforts of everyone else.

If this service would be appropriate, try to identify a WM who might carry it out, with the co-operation of his employer.

Co-operative Management instructors are often ignorant of case studies which are available even in their own institution which have been written by their colleagues; it is vital that case studies within an institution, within a country and even internationally should be made as widely available as possible.

Try to ensure that all WM's agree to share with oneanother any cases which they may write or obtain.

THE ICA/CEMAS PROJECT

The International Co-operative Alliance has a special unit called the Co-operative Education Materials Advisory Service (CEMAS). This manual is one of the publications of CEMAS. A particular function of CEMAS is to facilitate the exchange of useful education and training materials between Co-operatives in all parts of the world.

For case studies CEMAS has set up a Co-operative Case Studies Bank. Participants in workshops such as this are invited to send copies of their case studies for inclusion in this Bank. All individuals and organisations contributing case studies to the Bank are entitled to obtain free copies of other case studies from the Bank. All case studies will carry the name of the author and his or her employer. For further details WM's should write to one of the ICA addresses at the front of this manual.

Day 10 - Session 3

EVALUATION, SUMMARY AND ACTION COMMITMENT

Session Objective: To enable WM's to evaluate the workshop and to ensure that they commit themselves to a future plan of action which they will undertake as a result of having attended the workshop.

Approximate Time: 2 hours

Materials: Workshop evaluation form (p. 158)

Note to Workshop Leader

The workshop evaluation form which is provided should have been distributed to WM's well before this session or if there was not time they should be distributed now and WM's should be given time to fill them in. WM's should not be asked to put their names on the forms and the WL should stress that the objective of the form is not either surreptitiously to evaluate WM's themselves or to provide them with an opportunity for 'getting back' at the WL; the objective is to improve the workshop in future so that it may be more valuable.

The objectives of the workshop were as follows:

1. To enable WM's to improve their use of the case study method
2. To improve the WM's knowledge of Co-operative Management
3. To enable WM's to write case studies in Co-operative Management and to produce a collection of case studies in Co-operative Management for widespread use.

Clearly the evaluation form can only play a very small part in judging whether these objectives have been achieved.

If time allows the evaluation forms should be collected and WM's comments summarised in advance; this will ensure that suggestions, criticisms and comments which were made by the majority can be dealt with at length in discussion and that any points which are not easy to understand can be clarified.

It is vital to stress that the objectives of this workshop, as of any effectively organised training activity, have not been achieved at the end of the course. So far all that has been achieved is that time, money, paper and other resources have been consumed; the objective is that the results in terms of improved teaching and improved case study material should more than outweigh the costs which have been expended so far.

ACTION COMMITMENT

Each WM should be given a few minutes to put together his own project for future action based on what he has learned in the workshop; this should be presented by each WM under the following headings:

1. A Problem A statement of an existing training need, inadequate training activity or other deficiency in training or performance which it is decided to remedy.
2. Solution A statement of the action which the WM proposes to take in order to remedy the problem which has been identified in his own institution or in the organisations whose staff his institution exists to train.
3. Timing A statement of the time by which the WM commits himself to have implemented this proposed solution to the problem.

Each WM should be invited to present his proposed course of action to the rest of the group; the WL should undertake to visit as many as possible of the WM's shortly after the time by which they say they will have completed their project. This visit will have as its objective firstly the evaluation of the workshop itself and secondly, be a means of ensuring that WM's genuinely feel committed to implementing the proposals that they are now making.

WM's should be given the opportunity to discuss, comment upon and criticise each others' proposals but each should at the end of the session be in no doubt as to the action which he is going to take as a result of having been on the workshop.

If possible, the WL should follow up the session by writing to each WM summarising his action commitment and reminding him of the date by which he said he would complete it.

The last session of a training course or workshop is often seen as the end of the activity; this session should be used to stress that it is only the beginning. If nothing more takes place than the workshop itself it would have been a total waste of resources; the workshop should be the beginning of an increased use and writing of case study material and generally improved Co-operative Management training activity which will rapidly make itself felt in terms of improved Co-operative Management performance in the field.

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 analyse 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 organised; 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 summarised 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.	☐	☐

McNAIR ON CASES

ONE OF THE SCHOOL'S MOST DISTINGUISHED PROFESSORS DISCUSSES THE INTRICATE LITERARY TASK OF WRITING A GOOD CASE FOR TEACHING MANAGEMENT.

Amid all the talk about change, it is well to note from time to time that there are some things which have lasting value. One of these in the HBS context is the case, which has long been the backbone of the School's method of instruction.

One of the great case teachers is Malcolm P. McNair, the Lincoln Filene Professor of Retailing, Emeritus. Mac joined the Faculty in 1920 and retired in 1964 after 44 years of developing cases and courses based on them, and of teaching by the case method. He was an active participant in every phase of the School's work. Because of that extensive experience he was an important contributor in a project called the Visiting Professors Case Method Programme. This effort brought to the School 227 deans and professors from 119 schools of business administration from all parts of the United States. Each summer from 1955 to 1965 a different group of about 20 participants studied together with members of the HBS Faculty for eight weeks on how to build cases and how to teach by them.

Scores of visiting professors year after year listened attentively to "the voice of experience", Professor McNair, as he talked about the task of case writing. Some of what he said was included last year in a book by Andrew R. Towl, "To Study Administration by Cases", published by the Division of Research. The following excerpts are condensed from a videotape of one of Mac's discussions. They give a fresh insight into the complexity of effective cases and into why the School must raise so much money each year to make them possible.

I think it's highly important that the case develop a great deal of interest on the part of the student .... This seems to me to be a very cardinal point in the case method. A year or so back I happened to run into a little story that was published in the Standard Oil Company's sheet sent around to stockholders.....This described an experiment that was made out here in the Newton High School by some of our people here at the Business School and some educators from other areas....This was an endeavour to teach economics to teenage people by the case method....

** Reprinted from Harvard Business School Bulletin July-August 1971

As the observer said: "This was the first time I've ever seen economics made fascinating to kids. I was amazed at the way they picked up economic concepts. The personalised approach got to them. It was like pursuing a detective story." I'll come back to that thought a little bit later in another connection, but this idea of the development of interest getting students wound up in the situation - I think is a highly important part of the case discussion.

This is the sort of thing which I believe there's a literary phrase for - the 'willing suspension of disbelief'. In other words, the willingness to take at face value the situation which the case presents, forgetting that this is a case, forgetting that this is a classroom, being willing to take the situation at face value and become the person concerned with it - that is the ideal that a case discussion ought to achieve.

WHAT A CASE IS NOT

Now, more particularly with reference to the case itself (and you people are learning now about writing cases). Let's say some things that a case is not. The case is not just an example. It is not, at the other extreme, in my opinion, simply a straight-out, photograph slice of life. It is perhaps somewhere between those things.

I think the instances of successful use of so-called "armchair" cases are pretty few and far between.... The "example" which goes back to the medieval exemplum, used by religious writers to express a moral precept, in my opinion is not what a case should be....And a case is not, I think, a sheer guessing contest - a kind of a blind thing in which you repeatedly ask a student "What is this?" or "What do you do in this situation?" "No, you're wrong." "No, you're wrong." That is the sort of thing where you say: "Guess what I've got in my hand?" and after a number of people have guessed, you say "No, that isn't right; this is what I've got in my hand." I remember a great many years ago when one of these 'guessing' cases was presented by a businessman in the Business Policy course, and this type of situation came up. He presented the case of where he should locate a mid-western plant (he had a plant here in Boston), and most of the data which he presented pertained to two different localities. I've forgotten where they were, maybe South Bend and Dubuque, or something like that, and he came back about two weeks later and said "No, you fellows were all wrong; the answer was Kewanee." There was nothing in his presentation that gave any clue....That is not a successful kind of case.

And that is where the detective story analogy comes in....Because you know that if you read a detective story about "Who done it?", "Who knocked off the old boy?", and so on, and you got all the way through and discovered that somebody from another state that you'd never even heard of, that wasn't even in the story, did it, you'd say that wasn't a very good detective story. You expect that there are going to be clues in there which will enable the sharp reader perhaps to figure out who it is that the author has designated as the villain in the picture. And if it's completely blind and there is no possibility of figuring out on clues, it's a lousy job. Well, in the same way, a case to which the answer is Kewanee and all the author has told you about is South Bend and Dubuque - well it's a lousy case. So a case is not an armchair example, and it's not, I think, a completely photographic transcript (I'd like to come to that again in a moment) and it's not just a guessing contest.

A DISTINCT LITERARY FORM

I think that is fair to say that 'a case is really a distinct literary form'. It is obviously not a poem. It is not purely a narrative, but it has important elements of narration. It is not purely an exposition. It is not purely argumentation, but it may have important elements of argumentation. It is not just fiction, but as I've just indicated it may have an important analogy to a detective story.

I think that a case needs to be recognised as having a certain structure, and anatomy of its own; in fact, you might say, a series of structures. There is for one thing, a 'time structure' - a case takes place, a business situation takes place, *in time*. And there must be a fairly clear perception on the part of the student of what the time sequence was of the events taking place in the case. And you may organise a case around that. On the other hand, you may find it necessary to break the time sequence at certain points in order to bring into the case some other considerations. But you need to be fairly clear as to what was the sequence of the events, what was the time structure of the case. From the standpoint of developing interest you may want to take as a point of initiation for a case a late event in the actual sequence, because that may serve to heighten the interest - how the problem first came to light, so to speak. Then you manage through a flashback to show the early origins of the situation and build this up. But you always have to keep in mind the time structure of the case, and make sure that it is sufficiently clear to the reader.

Of course, as you already recognise, I am sure, the development of the time structure is a little complicated by the fact that cases typically need to be written in the past tense. A case that you have written currently as of this July is fine for discussion this fall, but even by next spring it has become dated; and it strikes the student as being a little bizarre if it is talking in the current tense about something that happened a year or two years or five years back. So, typically cases are cast in the past tense, and this gives you somewhat of a problem from a writing standpoint in keeping your tense sequence straight.

The case, I think, in addition to a time structure, needs to have a 'narrative structure'. Not only is there a time sequence of events, but the things that happened and the circumstances of their happening must be narrated in some kind of understandable pattern. Where did they begin, what led to what, and so on. In other words there is a flow of a story.

And clearly there has to be one or more 'expository structures' in the case. There is the situation itself which the writer must make clear to the student remembering that the student will not have the perception that the professor has. Thus, the case writer may have to spell the thing out somewhat more specifically for the student to grasp, than would be necessary for the group of business executives who participated in the situation. Clearly also there is an expository structure with reference to the company itself. Something must be said about the company context in which the action takes place. The student needs to have a good picture of the company. In addition, there is often an expository or descriptive job that needs to be done with reference to the industry... depending of course on the particular case. And then not infrequently there is a job that needs to be done on technological background.

PLOT STRUCTURE

But I should come back again and stress perhaps most of all the importance of what I would call the 'plot structure of a case'. The need for what was indicated earlier from the standpoint of developing interest and promoting the willing suspension of disbelief. For the case to be a really living thing and for the student to forget that it's artificial, there must be drama, there must be suspense. The skillful case writer will build this up. We, for many years, have used the expression that 'a case must have an issue'. There must be question of what somebody should have done, who is to blame for the situation, what is the best decision to be made under the circumstances. A case isn't just a bland narrative where there's no question or issue.

A case involves a problem of some kind, and the more you can develop the interest or the drama of that clash of ideas or maybe a clash of people, the better the chance of getting the kind of student commitment that makes for a good classroom discussion.

So, I think the case has a number of structures. It has a time structure, it has a narrative structure, it has several expositional structures, it has a plot structure. And frequently you have to interweave these in order to get the best results. You may start out with some incident which indicates the beginning of some kind of a situation, or perhaps the precipitating circumstances that bring the thing first to the attention of some executive. You may want to drop from that point in time to what has occurred earlier, or you may at that point want to go to the exposition of the type of company or industry, and so forth. These several structures usually need to be interwoven. This make the development of a case, I think, a serious problem in literary composition. But unfortunately, I don't think there are any textbooks written on this particular kind of composition.

LITERARY PROBLEMS AND DEVICES

Then there are what might be called literary problems and devices. I have mentioned a couple of times that the case is not just a photographic slice of life. A case represents 'selection from a situation'; it represents selection by the case writer. Now this poses a problem; this makes it necessary, I think, for a case writer not to take just one man's view of a business situation, but to get as many different slants as he can from as many of the company executives as possible. But still the writer can't avoid coming back to the feeling: "I'm the case writer, who is trying to make a selection of facts from this situation and to fit these into this rather complex type of literary composition which we call a case, and I've got to be very careful not to get my own personal feelings and judgements into the situation." Some people, in order to get around this particular difficulty, have used the device which you've probably seen in some cases of bringing the case writer himself into the case. Personally I have never liked this because I think this device runs counter to the student's feeling of reality about the case. Sometimes I think it is not stretching it too far to say that one of the questions here is, How much literary license to you have in writing a case? To what extent is it legitimate to heighten an interest by the process of selection? How far can you go? I think that sometimes it may be within the bounds of permissibility for a case writer to masquerade, perhaps as a consultant, or a friendly adviser, in the picture. That doesn't destroy the illusion and yet it does indicate that somebody is bringing in ideas that aren't necessarily those stated by the executives in the company.

You see, one of the problems is that anything that is stated in a case, unless it is specifically attributed to some person, will be taken by the student at absolute face value. If you question the student on any unattributed statement, he says: "Well it says so in the case " and I think he has a clear logic on his side..... But if the case says, "The president thought that," or "The controller surmised that," or something of that nature, whether it is a direct quotation or not, then the tendency of the student is to be on his guard and ask himself, "Well, do I accept this or not?".....If the statement is something which the instructor actually expects the student to question, I think it is important that the particular statement be attributed to someone in writing the case. That is, it should be indicated as an opinion, perhaps of an executive in the company or maybe that of an adviser, the unofficial advice perhaps of a consultant, or something like that, in the nature of a sounding board. It is dangerous for a case writer just to lay flat out a statement which he really wants the student to question.

So there are some very ticklish problems in this business of making a selection from the material that you are dealing with and trying to put it in a form to arouse student interest and also to put it in a form that the student can really understand. This is why I say that a case is not just a photographic slice of life.

There is also this 'problem of people' in the case. Years ago some of the teachers used to argue that we shouldn't let the personal side come into the case, just stick to the facts. But that was well before the reign of human relations began here at Harvard. A current illustration comes to my mind... Mr. Sloan of General Motors, as you know, has recently written a book which was published serially in abridged form in "Fortune". Peter Drucker, a writer on business management subjects, takes Mr. Sloan very severely to task, because in his narrative at all times he essentially said, "At this point, here was the problem we faced. It seemed to me that this was how it developed. There seemed to be these possiblities. This is what we did and why. This was the result." And then he moved on to the next one. At no point, says Mr. Drucker, did Mr. Sloan say anything about the people and their feelings or how he persuaded his associates to do various things, not a word of that anywhere in his book; and at no point did he lay down any general rules of conduct by which he was guided in his management work. So Drucker was greatly disappointed with this book of Mr. Sloan's.

Well, I think our early cases at the School were somewhat like Mr. Sloan's book, at least in one respect. People and their feelings were not allowed to come into the cases. Of course, the thinking on the matter has changed a great deal in these days. But nevertheless, while you are frequently inclined to bring people and personal feelings in, perhaps to use the device of dialogue for the purpose of heightening interest, remember the students are not easily tempted to go overboard on this angle and concentrate their attention on people and personal aspects rather than on the analytical side of the case. So, while I think it is useful to bring personalities to some extent into a case if they are pertinent to the problem, this practice courts the danger that the students will be looking for human relations problems in situations when other issues are more important.

INDICATION OF AN ISSUE

Another of the literary problems in case writing is the indication of an issue. Quite a few of our cases - particularly our first-year cases - are likely to be fairly clear-cut in indicating an issue. For instance, I have a case here which is a very good case, a very useful case. The first paragraph reads as follows: "In April 1952, the executives of Western Auto Supply Company in Kansas City, Missouri, were concerned with the results of the second year's operations of the incentive compensation program for the company's retail store managers and assistant managers." The second paragraph goes on to develop the reasons why they were concerned: The amount of executive bonuses had been very much greater in one year than they were in the following year, and because they had been lowered so much in the following year, the morale of the store managers had been badly injured. That is just a bald, straight-out statement. You know right away that the issue in this case is about an executive compensation plan which has failed to work out, that questions will be raised as to why the plan failed, whether it can be corrected, or whether it should be dropped, and so on. I think maybe in a good many first-year cases a bald statement of that kind may be useful. But there are many situations in which it is better to leave it to the student to analyse what he thinks the issue is. Thus the case will present the various precipitating incidents and pieces of evidence that indicate something isn't right, rather than coming out and baldly stating the issue. Here again, these are what I call literary problems in writing a good case.

BRIDGING THE GAP

Another problem might be described as 'bridging the gap'. There is still a great gap in comprehension between a student, even in a graduate school, and the business executive. The business executive has become accustomed to the use of a certain amount of shorthand, so to speak, in describing business situations - the reports, memoranda and so on, that circulate in companies are frequently not usable directly in their original form in a case. Sometimes they are, but in a good many situations you've got to go a step beyond these raw data in your presentation. Also, if you have a good deal of data in a case, remembering that the student has the job of preparing for two or three classes for the next day, it may be desirable to do some putting together of data for the student. If he is left the entire job of doing that, he may be so baffled that he does only a half-hearted job of preparation. Thus we sometimes find, after the initial experience of teaching a new case, that we need to take some steps here and there to bridge the gap, to put some of that information together in a more usable form, going beyond the form in which we got the material originally from the business executive.

There is always, of course, the 'disguise problem'. Where you can get permission to use the actual company names and facts that is fine; but this is frequently not possible, and disguise problems are sometimes quite ticklish. If the company insists that you disguise the industry, it's probably no good; you might as well drop the case at that point. Sometimes, however, I think you can disguise the product. We have a quite successful case.... in a large retail organisation in which the product, for purposes of disguise, was shifted from one type of major appliance to another. It was exactly the same kind of problem, and I don't think anything was lost by making that particular shift in product. But if the executives want you to change the industry, it usually is no good. Commonly the disguise problem can be met by preserving the ratios and changing the dollar values, in other words, using some kind of constant throughout the case to alter the dollar data. Also, the location can usually be changed. In your selection of a fictitious name, avoid using one that might be the name of a real company. Sometimes you can leave a false trail; if you have, for instance, a case on Sears Roebuck, You might write it up to make it sound like Montgomery Ward, without in any sense really destroying the fact that you're dealing with a very large mail-order company.

There are various other minor writing problems such as the use of headings, appendices, and so on. I don't think it's necessary to go into those; here you can use your own judgement.

NO QUESTIONS AT THE END

Finally there is the matter of using questions at the end of the case. I have told you I personally don't like the device of bringing the case writer himself into the case because I don't like to destroy the illusion. In the same way, I don't like questions on cases. The minute you've got questions 1, 2, 3, 4, 5, 6, as you frequently see in the case books....you have destroyed the illusion. The student is made acutely aware at this point that the case is an artificial teaching device.

But if the situation is presented to him in such a way that he is interested in developing ideas about what to do in this particular situation, and has become intimately concerned with his problems so that he is really putting himself into the shoes of a particular individual, that seems to me to lead to the most desirable atmosphere and most effective case discussion. So I sheer away from anything that pierces that essential veil of illusion.

I sympathise fully with the problem of the case writer trying to manage his material. As I have tried to indicate to you, case writing is an art, and a good case is a definite literary accomplishment.

THE CASE METHOD OF INSTRUCTION

Adapted by Professor Albert N. Schrieber from writings by Harbridge House, Hunt, McNair, Newman, Planty, Smith and others.

There are many good ways of teaching. One such way - the case method - has been given increasing attention in recent years in programs of executive development. The case method of instruction, however, is not new. It has been successfully used in management training since the early part of this century.

The desired result of the case method is to develop in the participant the ability to effectively reason when dealing with specific problems. Appropriate use of theory, and the acquisition of factual material and procedure skills are also important goals. The heart of the case method however, is the use of problems to discover and fix in one's mind ways of thinking, ways of feeling and ways of doing that are productive. The three main components of the case method of instruction are; the case, the conference member, and the instructor.

THE CASE

The case is a written account of an actual situation which raises problems that the administrator in the situation must solve. The case contains background information on the objective of the activity, its size and location, and the people involved. Within this context, the case relates a series of events and administrative difficulties that confront the responsible executive. The problem may not be clearly defined, inasmuch as the executive in the situation may be compelled, through his powers of observation and analysis, to determine what the problem is as well as the best courses of action for its solution. The case is accurately prepared by a trained research man, and though it may be disguised appropriately to maintain anonymity, it is an account of an actual situation.

The aim of the case is to present the facts that were known or available to the executive in the case situation and which formed the basis for his analysis and decision. The decision is typically not described in the case; rather the development of decisive courses of action is left to the student. If a decision is indicated in the case, the discussion often focuses upon an analysis of the validity of the decision.

The case may only be one or two pages in length, or it may run to ten pages or more. It may contain organisation charts, excerpts from surveys, statistical analysis, and other supplementary data. In relating events leading to the administrative difficulties, the case may impart substantive information about techniques, procedures, systems, organisational structure, environmental conditions and other facts.

Since a case is an account of an actual experience and since all experiences are unique, at least in terms of some of their details, it is important that the case be concerned with major issues that underlie executive action. The complexities of the process of delegation, for example, are encountered by all administrators. A case raising some of these complexities for analysis and discussion would be worthwhile- even if the actual context within which the problems were raised would never be met in exactly the same form by the conference members.

THE STUDENT

The case is prepared by the students prior to its discussion in class. The facts of the case are appraised in the discussion, and members in the discussion not only suggest the course of action they would recommend but defend their courses of action against the criticism of other members of the group who may have different ideas. Although the discussion of many cases may lead to a decision accepted by a majority of the members, the discussion is not necessarily intended to culminate in any one approved solution. In problems involving organisational and personal relationships, there is frequently no one correct answer.

In preparing the case, the student does more than analyse the specific problems involved. Typically, he will relate the case problem to problems he has encountered in his own experience. His view of the case may be sharpened or indeed be prejudiced, by this setting of the case problem in the context of his own experience.

In the discussion itself, the individual participants may find that the opinions of other members of the group differ sharply from his own. One individual may learn, through the comments of others, that he has overlooked certain salient points. Another may find that he has weighted one factor more heavily than other members have. This interaction of presenting and defending conflicting points of view, causes individual members to reconsider the views they had of the case before the discussion commenced. It leads to a clearer perception of problems, a recognition of the many and often conflicting interpretations of facts and events, and a greater awareness of the complexities within which management decisions are reached.

THE INSTRUCTOR

The instructor plays a different role in the case method than in the conventional method of instruction. The instructor, in many respects, is an equal in the discussion group. It is his task to stimulate, guide and summarise a productive, and above all, a practical discussion. The instructor should generally refrain throughout the discussion from interposing his own judgement, asserting or suggesting that some view is clearly wrong, or from asking leading questions designed to get a particular response. His main effort as discussion leader should be to get the comments of various individuals understood and fully explored, especially when they bear on the issues which the case most specifically raises. The members should arrive at a common approximate solution without being unduly pushed toward it by the instructor.

The above limitations on the role of the instructors in no way imply that he is not free to express his own opinions, comment on the opinions of others, or, in summarising the discussion, point out principles of administration or useful generalisations growing out of the case discussion or underlying the problems in the case. What is implied is that these remarks by the instructor should enhance rather than inhibit the discussion. For the discussion and the thinking behind it on the part of the participants is the chief ingredient of the case method. Through questions, restatements, and summary remarks at critical points in the discussion, the instructor sees to it that a vigorous discussion takes place and that the many issues in a case are properly examined.

SUGGESTIONS FOR CASE STUDY AND ANALYSIS

A case should not be studied just to learn particular answers. The chances of again facing an identical problem are small; hence there is little value in memorising the 'right answer'. Nevertheless, cases are of great value because of the thinking that one does while solving them.

Also, it is rare that enough cases are presented on one subject to enable the student to formulate his own complete generalisations. Rather, the fundamental grounding the student gets in other courses or from books and lectures provides him with a condensation and distillation of experiences that is often impractical to repeat in cases. Study of cases complements and supplements this training in principles, but should not be regarded as a complete substitute for it. Cases will be of greatest value if they are regarded, not as symbols of truth in themselves, but as useful and stimulating training devices.

The study of cases should, of course, follow essentially the same steps an executive would use in resolving an actual problem. A brief summary of the technique of case study may be helpful. Each student, however, must develop his own analytic methods.

1. It is always essential to develop a complete mastery of the facts in the case, sorting out those that are pertinent and discarding any which are found to be irrelevant. As part of the process of mastering the facts it frequently will be found desirable to utilise the numerical data in the case to make any possible calculations and comparisons that will throw light on the problem.

   Develop a clear, mental picture of the situation being studied. This calls for realistic imagination because it is never possible to give all the facts. If the student lacks the background to fill in these details, he should seek descriptions of industrial or departmental operations which will aid in this "sensing of the situation". A realistic imagination is well worth cultivating because of its usefulness to an executive in thinking through the effects of a contemplated plan of action.

2. Clarify the problem. The purpose, or in military terms the "mission", should be clearly set forth and then the operating situation should be reviewed to determine the difficulties in reaching it. Ask yourself, "Just what is wanted and what am I up against?"

   The student is asked to undertake to determine the exact question at issue. Sometimes the issue may be very clear, but other times it may be quite obscure, because the first form in which a business problem presents itself to an executive may only be remotely similar to what he finally determines the real question to be. Learning how to ask the right questions is one of the most important arts of business management.

When the issue has been clearly determined, the next step is practically always to break it down into subissues or subquestions. In other words, to answer the main question it will be found necessary to answer certain subordinate questions. The formulating and answering of these subquestions is the heart of the analysis. The omission of a significant question may lead to costly error in decision.

3. Determine the alternatives and the key factors in deciding which is best. This is the heart of the analytical phase. Usually there are several possible solutions to a problem, and the wise choice must rest on identifying the crucial differences. This factoring of the problem enables one to concentrate on the important issues and avoid wasting time on insignificant matters.

4. Marshal and analyse the facts. Here "facts" include opinions, inferences and forecasts as well as historical records and statistics. Care must be taken to appraise the reliability of such information; rarely is it possible to make executive decisions solely on the basis of objective data. This data then must be sifted, combined, and related to the alternatives and factors developed in step 3.

5. Decide on the course of action. Judgement is usually still necessary in deciding just what plan to follow. Often one factor must be balanced against another, adjustments made for uncertainty, and full recognition given to timing and difficulties of putting the plan into effect.

6. Check the decision from several angles. Executive action almost always deals with a complex situation, so it is wise to examine a plan from several different points of view. For example, an organisation plan can be checked by tracing a typical transaction from start to finish to make sure "who does what" is clear. Or, a personnel decision may be checked by putting yourself into the position of several different individuals and thinking how each will react.

7. Prepare an appropriate report for your own reference or when required for others. This should not necessarily cover all the steps just outlined. The person reading the report may be interested in a summary of your mental process in reaching the decision, but action is more likely to be taken on a crisper, more persuasive document. The report should be suited to the person who will see it and the purpose it is intended to serve.

The man who can do each of these steps well has developed the ability to make sound executive decisions.

ADVANTAGES AND LIMITATIONS OF CASE STUDIES

ADVANTAGES	LIMITATIONS
1. The case study method trains men to identify and analyse complex problems and to frame their own solutions while in the instruction process. Experience is obtained in diagnosing concrete problems and applying principles or generalisations in their solution. The business executive does not deal with operations "in general" nor always "in the typical situation". He faces a specific set of conditions and must act accordingly. Principles are of value to him only if he can employ them to overcome definite obstacles in reaching his objectives. The study of cases provides drill in this translation of general ideas into effective action.	1. Trainees should be successful men of wide experience and sound judgement. Otherwise their analyses are likely to be superficial and their solutions impractical.

2. Since each member of the group makes his own proposal, no one man's solution or analysis is accepted without criticism. Learners are exposed to a variety of approaches, interpretations and personalities.

3. Principles and generalisations, if they are drawn, come from practical cases and are established by the learners themselves who develop a fuller and more realistic understanding of sound principles. The use of cases provides an opportunity to check the real meaning of a principle; often what appears simple as a generalisation is not so clear when one attempts to apply it. But once the concept has been tested and found helpful, it takes on a new significance; it becomes more like a familiar tool. Moreover, in solving cases one soon discovers that the principles keep bumping into each other. Most real situation have several facets, and action on one facet may have serious repercussions in other directions. These overtones and interrelations are important to a practical understanding of principles.

4. The case study method reduces the overconfidence of dogmatic participants by submitting their ideas to challenging, thoughtful criticism by their equals.

2. Some individuals are reluctant to submit their ideas to thorough criticism and resent anything except agreement. Such men must be handled with so much caution that the method may be impractical.

3. Those who have been brought up in the lecture, recitation, or textbook-with answers tradition may be completely adrift in a discipline that demands analytical thinking but provides no answers and leads to no "best" solutions.

4. Case study also may be criticised on being a piecemeal approach which lacks in focus, since it allows various men to present a variety of ideas and conclusions but avoids using any mechanism that could put the whole problem together as the study comes to an end.

5. "Departmental" specialists are taught to seek an insight into the over-all problem of the entire business. Participants are given a chance to make decisions which may be beyond the requirements of their present responsibilities, thus preparing them for increased responsibilities.	5. Like role playing and other off-the-job approaches, this one gives no assurance that classroom success will be duplicated in office, factory or store. Men who understand a problem and frame an acceptable verbal solution still may not know what steps to take or how to take them. Under the pressures of their heavy workloads, conflicting personalities, and loyalty to old methods, brilliant analysts may fail in practical application.
6. By their very nature, cases appeal to both students and supervisors alike. They have a flavour of reality. They are dramatic. They clothe academic ideas and formal principles in a humanistic form and incorporate the strengths and weaknesses of people. The characters in the case live and have real meaning. In fact, characters in cases, take on such reality that their names are constantly brought up in social gatherings of the learners and even become synonymous with the error or success in which they have been involved. In contrast to some tedious texts on scientific management, cases are the "novels" and "dramas" of the work place.	6. Since most of us have been educated in a system in which the teacher "knows the answers", or the "answer" is in the textbook, most participants in a case study programme feel some degree of resentment towards to the method of the instructor when the latter refuses to tell them whether they are right or wrong. However, after trainees have had enough experience with the method to recognise and accept their role and responsibility, this resentment disappears. Cases usually lack all the "facts" a student desires to have about the situation. This lack may appear to force decisions to be made that are based on inadequate information. It must be recognised, however, that this is the typical difficulty most executives face, and they must learn how to fill in the missing data with reasonable assumptions.

DEVELOPMENT OF PERSONAL UNDERSTANDING

The difficulties of the student are admittedly aggravated at the outset by the use of the case method. Undoubtedly it is easier for the student to acquire so-called knowledge by the route of the textbook and the lecture. The case method is the hard way. Nevertheless, in the opinion of many educators the case method makes the difference between real education and merely passively acquired words and ideas.

The statement frequently is made that knowledge is power. Too frequently that is interpreted to mean that knowledge confers power. Nothing could be less true than that passively acquired knowledge confers any power on the recipient. The true meaning of the statement "knowledge is power" is that true knowledge <u>consists</u> of power, power to tackle a problem, break it down, sort out the facts, see what must be done, and then to get it done. In other words, real education should equip the student not just with book learning but with power to deal with situations, particularly power to deal with new and unfamiliar situations. That kind of power cannot be conferred. It has to be acquired. It has to be acquired by painstaking personal effort. Real education is hard work. It is a process of drawing out the student's mind, not of pouring in the instructor's ideas.

Thus, the result aimed at is not the accumulation of knowledge in the form of facts or conclusions that can be readily memorised and repeated. The objective is rather the development of power to think in a constructive, orderly manner when facing new situations. Furthermore, business situations present many differences, and solutions appropriate in one case for a particular company are not necessarily appropriate for all companies. Each case, however, is an experience from which something should be gained. Much of this gain comes from reviewing the experience. Thus, while careful and methodical study of cases prior to discussion is obviously necessary, the critical questions raised are of special importance. Indeed, if the student does no more than decide in each case what are the issues and what are the critical questions underlying those issues, he will be making real progress.

But it would be a serious mistake to regard each case as a wholly individual and isolated business situation. Why is experience deemed to be such an important asset for any business executive? It is not because he remembers the details of each of hundreds of thousands of particular situations, but it is rather because he has developed out of the experience of these situations the power of discrimination and generalisation. He is able to know which situations are alike and which are unlike. In those which are alike he is continually forming generalisations as to what to look for and what to do in particular types of situations.

These ideas are what we call "currently useful generalisations". They are guides for thinking, precepts for action. Some academically minded people might be tempted to call them principles of business administration; but the word "principles" suggest something immutable, having a very broad application. Hence, if we think only in terms of principles, there is danger that we may strive for too great universality and wind up with mere platitudes or truisms, such as "The customer is always right", a statement which is broadly true but which is not a very useful guide to thought and action in particular circumstances. Before leaving any case, therefore, and particularly in reviewing a series or group of cases, a student should always ask himself "what currently useful generalisations can be drawn?"

This article, by Malcolm Harper, appeared originally in the bulletin of the American Association of Collegiate Schools of Business, January, 1974.

SMALL BUSINESS CASE STUDIES

At present the use of small business case studies is mainly confined to courses which specialise in smaller enterprises, or to the early stages of elementary accounting or other courses. Very short and greatly simplified case studies of this sort are used merely to introduce students to the basic concepts involved. Some preliminary experience with undergraduate and graduate students at the University of Nairobi, and a wide range of public and private sector managers of all races from all parts of Africa, indicates that the use of small business cases might profitably be extended, not only in the so-called developing countries, but elsewhere as well.

There are numerous definitions of small business which are presumably useful for the purpose for which they are intended. For the purposes of this paper a small business is defined as one in which virtually all important decisions are made by one man. Most of the case studies whose classroom application and value are discussed concern businesses which are typically owned and managed by one man. They may employ, on a part or full-time basis, a few other people who may well be members of the owner/manager's family. They include farms, small retailers, local transport enterprises, and small-scale workshops. Their turnover and assets employed are usually tiny by Western standards, but otherwise they are very little different from businesses of the same kind throughout the world.

A major problem for teachers of business and administration in Africa or other similar areas of the world is the scarcity of local material. It may be accepted that the basic theories and principles of all aspects of management are the same, so that texts from one environment are suitable and applicable in another. All management texts, however, are written with the background of a particular environment in mind, consciously or otherwise. A textbook which was totally devoid of examples drawn from actual experience would be monumentally dull and probably rather ineffective as well, because the reader would receive no assistance in relating what he read to the real world he knew. There are few business or management texts which relate to the African environment. This is because the market is still very limited and is further fragmented by language differences. In addition, there are important differences even between countries speaking the same languages, such as the currency unit employed, the structure of business law, the basic agricultural foundation of the economy, and cultural attitudes to debt, employment, and other features of commercial life. For anything but the most elementary material, therefore, the instructor is thrown back to using books which relate to a European or North American environment.

Locally based case study material is one obvious way of helping students to relate what they have read or heard from their instructors to their own environment. Even if the case method of teaching is not particularly favoured, there seem to be good arguments for using it in these circumstances. The instructor himself, if he is one of the many expatriates on a one to three-year contract, is as ill-equipped to relate what he is teaching to the local environment as are the textbooks he has to use. The students are usually from rural backgrounds and are totally unfamiliar not only with management but with the institutions which have to be managed. Case studies can thus play a double role; they provide practice in analysis and decision making, and they help to introduce the students to the business environment itself.

Unfortunately, however, local case studies are almost as scarce as local textbooks. Although it is easier and quicker to write a few cases than a whole textbook, there are particular problems which make case writing more difficult than it is in Europe or North America.

Firstly, there are very few people who have the education, experience, and inclination to work on collecting case material. Even if case writers can be recruited, it is often difficult to persuade local companies to co-operate. Accounting regulations do not usually require very much information to be disclosed, so that even the figure for annual turnover is confidential. Issues such as profits, the use of local labour and materials, and the degree of control that may be exercised by foreign shareholders are politically sensitive. Some managers exaggerate this problem, either to impress the enquirer or in fear of offending their superiors. It is usually impossible to disguise the source of a case which involves an organisation of any size because there are so few such companies in any one country. Even apart from these special difficulties, the complete process of writing a case study involving a large organisation is a lengthy one, and in the absence of specialised case writers the instructor himself can ill afford the necessary time.

Case studies describing small business situations can far more easily be produced. Small-scale businessmen are only too anxious to discuss their problems with an informed and sympathetic listener. In the process of finding out the relevant facts and figures, the case writer can sometimes make himself additionally welcome by giving some useful advice on accounting procedures, stock control, or other simple aspects of management. Because the owner or the manager is likely to be the only executive, it is usually not necessary to interview anyone else, and this clearly makes the task of case writing much faster.

The initial incentive for the use of small business case studies is certainly the desperate need for local material. Experience in the classroom, however, has shown that what at first appeared as a possibly second-rate but necessary expedient may well be an extremely valuable teaching aid in its own right. As has already been stated, most students in developing countries come from a relatively primitive rural background, and their only contact with any kind of business has been with small retailers and workshops near their homes. While it is necessary to introduce the students to large organisations by means of case studies, field trips and the use of outside speakers, the world of such organisations is almost as remote to them as that of the United States or Europe which is referred to in the textbooks. There is a danger that management may come to be perceived as being concerned only with the world outside their own countries, or as represented by the majority of large local companies which are foreign owned. This feeling may even develop into a hatred or contempt for the whole subject, which is seen as yet another aspect of neocolonialism. Small business case studies can show the students that good management is just as important to the locally-owned, small enterprises with which he is familiar. In realising this, he is more likely to accept the value of what he is learning, so that he can later apply it to whatever type of organisation eventually employs him.

In the particular circumstances of developing countries, there are also other advantages in using material of this sort. A university student is often regarded with some awe in his home area. He is approached for advice of all kinds and, in particular, on business and financial problems. If he has acquired some familiarity with the analysis of small business problems he will be better equipped to respond to requests for advice. If he is able to perform a useful role in this manner, it may contribute in a small way to preventing the serious cultural alienation which often takes place between a university student and his family and neighbours. He may avoid regarding his education as a reason for total disassociation from his home background; and his family and others will feel that he has something to offer them in return for the sacrifices they have made. In addition, many students soon become involved in small businesses themselves after they graduate, since the relatively high salaries they receive allow them to make the very small investment required to start a business. The experience they gain from case studies in this area should help reduce the high failure rate of part-time businesses of this sort.

In addition to the advantages which may be peculiar to developing countries, further experience with small business case studies indicates that they may be of great value elsewhere. Over a period, cases involving large organisations have become available, but they have by no means supplanted the material developed earlier.

The level of student participation, and the quality of written analysis, has generally been of a higher average level when small business situations are involved. This has been true not only of undergraduates but also of postgraduate and senior management groups, including expatriate managers from more developed countries. These men have been extensively exposed to large organisations and are, in fact, far more familiar with them than with small ones. This does not appear merely to be a case of the small scale situation being easier to analyse. The purpose of the case method of teaching is not to teach the student how to analyse case studies, but to help him to develop principles and methods of approaching problems which will be of general application. Judged by this standard, the small business case studies seem to have been as useful, or more so, as the more traditional material involving larger organisations. Students have often been able to grasp and develop principles of management in many fields far more quickly and have been able to apply them to large organisations, both in case studies and in later employment.

Small business is likely to be less useful in some areas of management study than in others. The fields of organisation theory and human relations for instance, while not wholly untouched, are obviously not comprehensively covered by small business cases. It is not suggested that such case studies should replace those involving large organisations but merely that their use should be seriously considered at all levels, and at all stages, in the study of certain areas. The areas where they have so far proved particularly valuable include business policy, marketing, financial management, and control. This list is by no means exhaustive, and specialists in any field may find that judicious use of this kind of material, not only for the elementary stages of a course, may prove very productive.

The case method of teaching represents an attempt to simulate a real life situation; for that reason, most case studies are written from the point of view of one man, even if the situation involves many different people within an organisation. In this way, the individual student can identify with the individual manager, and, at least to a limited extent, imagine himself to be in the same situation. Case material can duplicate real life exactly when figures are presented, but descriptions of personalities, and personal relationships, are clearly a poor substitute for the knowledge and feelings of the man on the job. Small business, as earlier defined, tends to focus on one man. Group decisions, or management by committee, are very unusual. The individual's role is critical; he has no supporting staff services, no responsible subordinate whom he can blame, and no superiors to whom he can refer a difficult situation. This may in one way, make the situation easier, in that there are no problems of allocating responsibility or detailing the appropriate organisation structure.

Educationally, however, such a situation poses a far more realistic problem to a student, and one which can far more effectively be described in writing. The student's own responsibility for his education, and reliance on his own resources, is very close to the position of the owner/manager of a small business.

In large organisations, it is difficult for a case writer to decide what problems to describe. He can choose the major issues that confront the organisation as a whole, and which involve decisions which may vitally affect its future or its very survival. The difficulty here is that so much information is involved, and so many factors are relevant, that the case either becomes sketchy and superficial, or impossibly long so that it is impractical for classroom purposes. There is a very real risk that if the case writer takes the option of relative brevity, with the chance of superficiality, he may conceal from the students what should perhaps be one of the most important lessons to be learnt, namely the difficulty of isolating major issues from among the vast mass of information which is available to management in any large organisation.

He may, on the other hand, select less critical issues, such as those facing branch or departmental managers. Here it is often very difficult to reproduce the sense of urgency which may have surrounded a particular issue, because it is small in relation to the organisation as a whole. Drama is an essential element in any good case study, but it should not be artificial. Because of the fragility of so many small businesses, many decisions which would be routine in a large organisation are indeed a matter of life and death for the owner/manager of a small enterprise. The nature of the decision may be no different, but the implications in terms of the survival of the business may be such as to introduce a very real element of drama. This makes it far more likely that the student will be able to identify with the individual whose situation is described.

The ideal case study should give as much information as would actually have been available to the manager involved and no more. In a large organisation, any manager clearly knows a great deal about other departments or divisions. Even if such background information is not directly relevant to a problem within his own section, the knowledge is a part of the equipment he brings to the process of decision making. A case study which does not similarly equip a student is to that extent unrealistic. If a case provides this sort of background information, however, it can easily become too long. A case study about a small business does not need the same amount of background, so that more space and student time can be devoted to the details which are directly relevant. One criticism of the case method of teaching, which is perhaps valid, is that students often have to devote more time to familiarising themselves with background information than identifying and solving the problems whose analysis is the main educational purpose of the case. This background may be of necessity so disguised that it bears little relation to reality, and in any event it is surely not an important part of the role of business education to familiarise the student with outline information about various industries or organisations, which have been chosen not for their intrinsic importance but because they happen to provide the setting for interesting case situations.

Apart from the advantages already discussed, there may be some other incidental, but nonetheless important, reasons for using small business case studies. Countries at all stages of development, in all parts of the world are coming to appreciate the vital national role played by small business. An increasing number of graduates of business schools are entering small business themselves either as initiators of new ventures or as employees of existing ones. Most large organisations are dependent on smaller ones, as suppliers, distributors, customers, or all three. Managers can only get the best out of such relationships if they are familiar with the particular operating problems of small business. A student who has been exposed to these problems will therefore be better equipped for his job, whether he is employed by government, by small business itself, or by a large organisation which depends on smaller ones for one or more of its inputs.

It is important to emphasise once again that small business case studies are not recommended as a replacement for the more traditional kind; it is merely suggested that teachers of business and administration - anywhere - might do well to examine the possiblity of using a few such cases in their courses, and not only at the elementary or introductory level. They are not necessarily applicable in all subject areas, but it appears that the possible returns in greater student involvement and more rapid assimilation of the relevant background would at least justify experimenting with greater use of small business case material than has been customary in the past.

Note by Author: While this article deals with small business enterprises, many of the points also apply to the preparation and use of Co-operative Management Case Studies.

MAJUR DAIRY FARMERS" CO-OPERATIVE SOCIETY

INTRODUCTORY

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

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

MEMBERSHIP

When the Society was registered in 1960 it had 43 members. In 1974, the 'A' class membership had gone up to 864. In addition, it had about 1,400 nominal members admitted on payment of 10 cents as annual nominal membership fee. Thus, in total, this Society received milk from 2,264 producers in its area of operation and thus, covered all the milk producers in its area. However, as the authorised share capital limit of $10,000 had been reached, the Society was not able to admit the remaining milk producers as 'A' class members. Excepting participation in democratic management of the Co-operative, other economic benefits were passed on to nominal members also without any discrimination.

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

The Primary Dairy Co-operative ran 20 collection centres. The milk was collected early each morning, by the Society through its 20 centres. These centres were provided with grading equipment by the Society out of its own resources. This equipment was serviced and maintained by the Society regularly.

At the Headquarters of the Society, a chilling plant was set-up with a total capacity of 8,000 litres; this belonged to the District Co-operative Federation.

For the purpose of transporting milk from the collection centres, 300 milk carriers were appointed, at the rate of 30 cents per day. In addition the Society hired three trucks for $40 per day in total.

The Society classified members' milk into A, B and C grades. The C grade milk was based on the minimum standard specification approved by the Government with 6 per cent fat and 9 per cent SNF content (buffalo milk) and 3.5 per cent and 8.5 per cent respectively for cow milk. The rate payable for the grade of milk by the Government was 19 cents per litre. For B grade milk which was an improvement over the basic standard specification the rate received by the milk producer was 19½ cents per litre, and A grade milk, which was described as pure and adulterated milk with maximum fat and SNF content, was priced at 21 cents per litre. The policy was to pay 0.15 cents more per litre for every 0.1 per cent increase in fat content. Also for 0.1% increase in SNF up to 9.5%, 0.1 per cent per litre was paid as bonus by the Federation through the Society to members. The Federation's margin per litre was 2.2 cents out of which 0.6 cents were passed into the Society. Broadly, 75 per cent of the milk collected by the Society was of C grade while B was 10 per cent and A was 15 per cent. Grading was normally done once a week. Payments to members were made once a fortnight after receipt of payment from the Federation at similar intervals.

70% of the members owned less than 5 cattle each; 25% owned between 5 and 9 and only 5% owned 10 or more. There was one member who owned 35 buffaloes and delivered on an average 15,000 litres per year which was the maximum for the year. The next best was a farmer who delivered on average 9,000 litres per annum.

About $300 to $350 are provided for prize distribution; it is a practice with the Society to award prizes to the member who supplied maximum quantity of milk in a year and the next five below in that order. In addition, 20 prizes were given to members supplying maximum milk at each of the centres every year. Those who had already received one prize during a year were not allowed to take another prize, in which case it is given to the member next in ranking.

MANAGEMENT

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

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

EXPENDITURE ON STAFF

YEAR	NO.	$	TOTAL EXPENDITURE
1969 - 70	40	4,099.50	$ 5,929.00
1970 - 71	33	4,627.40	$ 8,263.80
1971 - 72	34	5,267.00	$ 8,586.80
1972 - 73	41	6,078.00	$ 9,568.40
1973 - 74	43	6,831.40	$12,491.80

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

There was no regular scale of pay for any of the employees and the salary was revised at intervals, and not on a very scientific basis. For example, the Secretary who was drawing $4 per month in 1960-61, was being paid $35 in 1974.

The Society received a managerial subsidy from the Government in the initial 3 years on a tapering basis of about $230.00. Five of the office employees had been trained at the Junior Level Training Centres.

OPERATIONS

The following statement shows how much milk was collected by the Society in the first year and in the last five years and the amount received for it. The profit-loss position is also indicated for these years.

	Year	Milk in Litres Delivered	Price Received	Profit/Loss Position
1.	25.12.61 - 30.6.62. (first year)	68,866	$ 4,520.00	
2.	1. 7.69 - 30.6.70.	1,529,382	$ 159,842.80	+ $1650
3.	1. 7.70 - 30.6.71	1,460,006	$ 155,914.50	+ $ 123
4.	1. 7.71 - 30.6.72	1,465,263	$ 145,067.00	- $ 124
5.	1. 7.72 - 30.6.73.	1,233,678	$ 185,783.20	+ $3032
6.	1. 7.73 - 30.6.74.	1,270,989	$ 179,396.30	+ $2315

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

Cattle feed was supplied by the Society which took a margin of 5 cents per bag. It was brought from the State-Agro-Industries Corporation. In the year 1974 the cattle feed (all types) supplied was of the value of $ 1890.

This business gave a net profit to the Society of $513.70 in 1974. (In the financial statements this was shown under a separate department and profit was carried straight to the Appropriation Account and not to the Balance Sheet).

The Society supplied medicines to the value of $150.00 free of cost to members. It also has a stud bull which is hired to the members in case of need for a nominal charge of 20 cents.

The Society arranged for loans to the members for the purchase of milch cattle. Up to 1971 the source of providing milch cattle finance was the Government Dairy Department. The loans were available at 7½% per cent interest for a period of

7 to 9 months. The Society charged two per cent margin on top of this interest.

Since 1971 the Nationalised Banks have come forward. The National Central Bank and the Farmers' Bank were advancing similar loans up to a period of 3 years at 13% interest. Thus each member has to pay 15% interest inclusive of Society's margin on these loans. The maximum loan is $300.00. A number of members have availed of this loan facility from time to time and have added to their number of cattle, and it is considered that two cows are the minimum economic unit. The milk delivery, collection of payment from the Federation and ultimate adjustment to the milk producers has been well co-ordinated and this has kept the overdues position to under 5 per cent. The payment are made fortnightly a week after the date of the receipt of the dues from the Federation.

FINANCES

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

STATEMENT - 1

Trading Account

Item	Debit $	Item	Credit $
Purchase of Milk	179,400	Sale of Milk	197,200
Milk Transport (Local Area)	6,200	Transport on Federations Account	1,400
Stores	400	Miscellaneous	100
Transport on Federations Account	1,200		
Road Repairs	500		
Gross Profit	11,000		
	$198,700		$198,700

STATEMENT - 2

Profit and Loss Account

Item	Debit $	Item	Credit $
Salaries and Wages	6,800	Gross Profit	11,000
Bonus to Milk Producers (at .05 cents per litre)	600	Interest on Loans	700
Interest paid to Federation	100	Transport	700
Transport Charges	1,800		
Rent	400		
Other Expenses	300		
Depreciation	100		
Net Profit	2,300		
	$12,400		$12,400

STATEMENT - 3

Balance Sheet as at 30.6.74

Capital and Liabilities	$	Assets	$
Paid up Capital	9,700	Cash at Bank	7,200
Reserve Fund	3,000	Savings Certificates	100
Special Reserve Fund	900	Federation Shares	6,000
Building Fund	300	Old Loans to be Repaid by Members	
Bad Debt Fund	300	- Buffaloes	4,400
Central Bank Loan	47,300	- Cows	800
Risk Fund	2,800	Interest to be Received on Loans	
Individual Advance Recd,	1,600	- Buffaloes	200
Salaries to be paid	500	- Cows	400
Cattle Feed Dues	1,500	Central Bank Loans to be Repaid by Members (New)	45,700
Member Recurring Deposits	2,500	Dues Receivable from the Federation	3,400
Dues Payable to Milk Producers	12,600	Advance for Construction of 2 Bridges on the River	3,200
Arrears for Payment for Transport	600	Dead Stock	2,600
Net Profit	2,300	Member Recurring Deposits (on Banks)	2,500
		Dues from the Federation on Account of the Sale of Milk	6,600
		Member Risk Fund at Bank	2,800
	$85,900		$85,900

NOTES ON THE FINANCIAL STATEMENTS

1. Dues of $3,394.20 receivable from the District Federation appear to be a disputed amount between the Society and the Federation and have been repeated continuously for some years in the annual balance sheet of the Society. The dispute was in connection with the lower grading given for the milk supplied by the Society to the Federation.

2. $3,200.00 were spent out of the Co-operative's own funds for the construction of two bridges on the river to facilitate transport of milk during the rainy seasons, from collection centres across the river. The Society owns two launches, which ply in the river and transport the members' milk from the other side of the river to its headquarters.

3. The Society has built-up Special Reserve Fund, Education Fund, Bad Debt Fund and Building Fund. The recurring deposits and Risk Fund are collected from members and invested in banks on their behalf by the Co-operative.

4. The Society has already repaid the dues on account of old loans received by it under the old Government Scheme for advance to the members, for purchase of buffaloes and cows, although $4,400.00 and $800.00 are still to be received from the individual members respectively on these accounts by the Co-operative.

5. The deposits collected from the members of the order of $1,000.00 have since been repaid in response to the demand from the members (1974). Similarly a part of the share capital has also been returned to the members and the maximum share capital an individual member is having now in the Society does not exceed $10.00 or 4 shares. The reason was low dividend rate (6%). The State Government has no share in the Society's share capital.

6. The borrowings of the Society from the Co-operative or other banks for the purpose of meeting the working capital requirements were nil. These needs were being met out of the advances taken from the Federation against payment for supply of milk. At times, the well to do members (bigger farmers and milk-producers-cum-trader-members) also advanced loans to overcome the temporary needs of working capital. Interest was paid for such advances to financing members.

7. The work of distribution of consumer goods has not been taken up by the Society, although the objectives in the bye-laws have made a provision for that. However, arrangements exist for their sale by local suppliers (who are also milk producer-cum-trader members).

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

9. The Financial Statements are not accompanied by the Budget for the following year.