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# International Co-operative Alliance

## Organising Study Visits

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# Objective

This manual is intended for co-operative field workers who, in the course of their work, may need to organise study visits for different categories of people in a co-operative. Its objective is thus to enable the field worker plan, organise and manage such visits in a manner that will ensure maximum benefits to those involved.

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# Introduction: Why Study Visits ?

The Mathata Multipurpose Farmers' Co-operative storage shed is a mess. The **Co-operative Field Worker (CFW)** has tried to convince the manager and employees working there, that order and cleanliness need to be improved. The CFW has assisted the society in stocktaking and has always found that one type of item is stored at random in various places, while bags with totally different contents have been meticulously stacked together.

A bin card system has been introduced, but it is difficult to maintain without any basic order. Moreover, records and accounts show that the society has a high leakage rate: goods vanish without payment.

During stocktaking, the CFW had the workers re-arrange the goods; these were piled and stacked again, but to no avail: the old disorder crept back in again.

The CFW has analysed this problem. He finds there are several causes: first of all, the workers are from the local village; they have never worked elsewhere and find it difficult to compare different ways of handling goods. They do what comes easiest at the time. Secondly, the manager, who should operate the system introduced by the CFW, is recently-employed and lacks experience in handling goods. He sees himself more as an office worker pure and simple. Lastly, the committee members, on being approached by the CFW, find it difficult to appreciate what he really means. They feel that order already exists in the storage shed, after all, members can get to their supplies without too much fuss!

So, basic storage knowledge is lacking on the part of most of these key people. The problem, therefore, is complex and yet their attitude towards adopting a new approach is, at best, only mildly in favour. Meanwhile, the committee itself is not interested. In sum, effective storage methods are unknown to the manager, new to the committee and outside the experience of the workers.

The CFW feels he has exhausted his own resources. He does not even regard himself as a storage expert, he has merely followed such operations in other societies. He has even searched, without success, for pictures of well-run sheds. In addition, he has made a plan of the shed, on which he has shown places allocated for each category of goods. This is hanging in the shed, to no effect !

Now, he feels that there has been enough talk and to bring in an expert on storage management would achieve little more than his own talking.

At this point, the CFW realises that a different approach is needed – a more effective tool, not just words or pictures but a real living example of a well-run storage shed in action, that must be seen collectively on a **visit**.

# I. “Dont’t Tell Me, Show Me!”:

## Study Visits in the Context of Co-operative Development

This manual is concerned with study visits. Not just any study visits, but such visits that help the development of co-operatives and improve performance.

In this context, a study visit involves bringing a group of people, such as cooperative members, committee members or cooperative staff to places where they can get first-hand experience of what other people do. The purposes of the study visit may vary, but in general, what is being studied is a “real life” situation.

In this way, study visits differ from other learning methods which may be based on the spoken or written word, audio-visual aids, role playing exercises, case studies, etc. At its best, the study visit can engage all our senses – sight, hearing, smell, touch, taste – in a way that can not be achieved by other methods. The physical presence “on the spot” and communication with people directly involved with the subject under study, will further improve the learning opportunity.

The term “learning opportunity” is deliberately chosen. If a study visit is to be successful, the organiser has to state its objective, plan it carefully, and be concerned with the details of organisation. Otherwise there is a risk that the visit will turn out to be a **lost** opportunity. Experience shows that many study visits become nice “outings” without noticeable effect on what the participants do later at home.

Study visits in the context of this manual should be undertaken with the purpose of facilitating development of co-operatives and improving performance. This will not be achieved unless they are well planned and organised.

This brings us to the organiser. In this manual, we see a Co-operative Field Worker (CFW) as the person involved. The CFW may be employed by a union or federation of co-operatives, or by a government agency concerned with co-operative development. He or she is directly concerned with advising and supervising co-operatives, and with education in the field. To a large extent the CFW is an “agent of change”, and strives to improve the performance of some co-operatives through actions planned and/or performed by him/herself.

Study visits will be one tool CFWs can use, and this manual sets out to describe when and under what circumstances they can be used. It also describes in detail how to plan and organise them.



# II. The Study Visit: Your Tool

To change the state of physical appearance of things you require a tool. For example, if you want to fell a tree, you use an axe, a saw or power from a heavy vehicle to pull it down. You find in most instances, that you have to choose the best tool in the circumstances, and that different tools have both advantages and disadvantages.

This also applies when a CFW is trying to introduce change in the form of improved performance or introduction of new activities in the co-operative. The CFW can use meetings, short courses, individual training, on-the-job instruction, performance aids (such as forms or check-lists etc.), and can also use study visits. Each of these tools has its own strengths and the CFW should use the most appropriate one to effect change.

## When are study visits appropriate tools to use ?

Basically we can talk about three areas of learning: **Skills, Theoretical Knowledge** and **Attitudes**. Skills generally require the use of your hands or body – such as repairing a bicycle or driving a car. Theoretical knowledge covers subjects you learn about and remember, like languages, arithmetic, or how bicycles or cars work. Attitudes cover your judgements and your views on matters such as preferring some foods to others or one way of doing things rather than another.

Knowing this, we say from the outset that study visits are not the best tool for learning **skills**. Time is limited and gives few opportunities for repeated exercises. Skills are learned by doing something repeatedly. So study visits are not the solution if you want people to operate a machine or fill in forms.

The area of **knowledge** seems closer to the mark. There is a lot of knowledge to be gained from a study visit. Those involved in the study visit see how others succeed in doing certain things; how – in general – certain problems can be solved; how procedures function in practice; how to organise for achievement, etc. The advantages of a study visit in this area of learning is that the participants can see for themselves what is going on and share the experience of people successfully performing tasks.

The area of **attitudes** is also involved when study visits are undertaken. Participants who can see for themselves that something is working well; that a certain problem can be overcome; that members respond to certain services from a co-operative; might then develop more positive attitudes towards changes in their own co-operative. For similar reasons, study visits can contribute to improved relations between a co-operative and its trading partners e.g. suppliers of goods or purchasers of produce. Part of the effects on attitudes will naturally stem from an increased knowledge, but the personal contacts with others in their working environment will contribute just as much.

We can therefore say that study visits can be used to increase the participants' knowledge and to change or modify their attitudes. But there are other methods which can be used to achieve such results, so we must look deeper to find out when study visits are better than other tools.

### **First-hand experience**

To begin with, what are the particular features of study visits in the learning area of **knowledge**, as compared with other methods? Study visits provide first-hand experience. The participants look at reality itself; they communicate with the people directly involved. With other methods the message is conveyed through words and representations of reality such as pictures, models, recordings, etc. So, maybe we can use study visits when other methods are inadequate. Anyone who has tried it will know that it is difficult to describe a process of work, an equipment, relations between tasks performed by several people, etc. While you may succeed when talking about things and jobs people have already seen or done, it is almost impossible when the subject is unknown to others. How, for example, would you describe the functions of a windmill to someone who has never seen one?

When telling is not enough, there are, of course, other methods we can use. We can show a drawing, a photograph, a film or objects; or we can demonstrate. In many cases however, it will be appropriate to use methods which do not require taking participants from one location to another.

But if the subject is complex – e.g. production of goods; the layout of buildings, reception or delivery of goods, etc.; or entirely outside the experience of participants (in the sense that you can not refer to known objects or processes), and if use of learning aids and demonstrations prove inefficient or difficult to arrange, a study visit may help.

### **Knowledge, skills and attitudes**

Let us look at the learning area of **attitudes** and find out what makes study visits different from other methods when faced with the task of getting people to change their minds and their behaviour.

It could be a situation where the CFW feels confident that another system would improve the performance of the society, but those concerned are reluctant or unwilling to change, and argue against it. Such situations are usually complicated, and the CFW would have to use skill and patience. Even here, study visits may help to solve the problems where talking and demonstrating prove ineffective. Seeing something in operation weakens the argument "it would not work". However, only careful planning and organisation can counteract the argument "it will not work **here**". Perhaps the most powerful effect of study visits would be that participants can hear from those people whom they often can identify. They hear what such people think about something after actually having tried it. You hear it, so to say, "from the horse's mouth". So, in a study visit participants are exposed to the arguments of others; they find out how things work and see the benefits.

As already mentioned, study visits could effect relations between co-operatives and its trading partners through changed attitudes. If members and management visit organisations “down the line” (follow produce all the way to the consumer) or “up the line” (trace back the goods, inputs etc. towards the producer), they might get a better idea of how the system works. Contacts with representatives of organisations such as the co-operative union, federation or marketing board might help to reduce suspicion and rumours that sometimes prevail about grading, pricing, identification of produce etc. This in turn might have effect on the members’ loyalty towards the co-operative. The study visit can in these cases, have a stronger impact than descriptions of the marketing structure, or assurances by visiting representatives of other organisations. (“If you don’t believe it, let’s go and have a look !”).

The best results are probably achieved when the visit is used to improve the knowledge of participants who already have a fairly positive attitude towards change. They can then find out how a system or operation functions, how it benefits the members etc., as a preparation for implementing it back home. Positive and curious participants tend to learn more than negative and hostile ones, and it is easier to strengthen an already mildly positive attitude than to reverse a negative one.

The last thing that should be said about the study visit as a tool is that it is a tool to achieve change. In this respect it does not differ from any other methods used by a Co-operative Field Worker. The CFW is constantly trying to improve the performance of the co-operatives under his/her guidance and to improve the services they provide for their members. The learning that the CFW tries to achieve in members, committee members and staff must therefore be **action oriented**. Participants must be made aware that learning opportunities are provided with the sole purpose of helping them to improve their cooperative in one way or another. This means that participants, after a study visit, are expected to take action to improve the performance of their society. Action taken afterwards is the test of whether a study visit was successful or not.

# III. Planning the Study Visit

## 1. The Objective

The CFW will have analysed the situation of the co-operative and detected problems in performance. He will then know the desired performance, and is faced with the problem of changing the behaviour of people in the society so that the goal is reached.

### Setting standards

The objective of a study visit could be, for example, to achieve “better order and cleanliness” in storage sheds. But this is too vague. The CFW identifies three categories of co-operators involved: the workers, the manager and the committee members. If their behaviour contributes in some measure to the solutions, the objective should then say how their performance is to change.

For workers they should see what a well kept storage shed is: appreciate order and cleanliness, and be able to maintain order and cleanliness by following proper rules. The manager has to know the standards set for the workers, and be able to supervise their work. For the committee members, they too should know what a well kept shed looks like, understand why the orderly way is better, and demand cleanliness and order in the society’s own shed.

### A study visit as part of a wider learning activity

The objective of a study should always state what the participants must be able to do afterwards. This is because study visits, like other tools at the disposal of the Co-operative Field Worker, are used to achieve change – to improve the performance of co-operatives. If we do not define first how we want something to change, we cannot know if we succeed. If the participants in a study visit represent different functions in the society, we must state the objective for each type of participant. This will also help in deciding who should go on the visit. Unless valid objectives can be stated for certain categories, they should be left out.

The CFW may think that setting objectives for a study visit is complicated. But when you think about it, it is only applied common sense, really. The CFW would not come up with the idea of a study visit unless it would help solve a problem. There is a **desired** way of doing things, and there is the **actual** way observed by the CFW. You can say that **the objective of the study visit is to help achieve the desired performance**. A study visit can be designed to give results in only parts of the desired performance, (full attainment depending on training or additional equipment). But when describing how you want participants to behave afterwards, you state the objective of the study visit. Objectives are a very useful aid in the planning and organisation of the study visit itself, and with an objective we can assess later the success of a visit.

## 2. The venue (destination of the study visit)

Obviously, study visits must go to places where tasks are performed successfully, and where they can be observed. The objectives of study visits will tell what the participants should be exposed to, and what areas should be covered by questions, discussions and possibly written information.

In the Introduction the example of the Mathata Multipurpose Society was given. The CFW needs to find other societies where storage sheds are kept in order and where the people involved are aware of the reasons for maintaining them that way.

It is important to stress that the operations to be studied are performed successfully. If you want people to learn and change opinions, you should show them good examples, not the average or part successful ones.

It is equally important that the visitors are able to see the process or system in actual operation. This means, first of all, that study visits are of no particular value when you cannot **observe** what is happening. As an example, if you want a group of societies' representatives to learn the techniques for conducting study group meetings for members, it is not very useful to go to a society to meet the Education Committee, the Education Officer or a study group leader, unless a study group meeting can be attended. Meeting representatives of other societies can be very useful, but there are several other ways to achieving an exchange of experiences – for example workshops and conferences.

Secondly, it means that the timing of the study visits must be such that the participants can see the operation "in full swing". Receiving of crops at a marketing society is often a typically seasonal activity, and so are many other operations in agricultural co-operatives. Workload may also vary with the time of the day (as in an abattoir, a co-operative bank or a bakery). The organiser must make sure that participants do not miss opportunities because of these factors. Looking at empty sheds and idle machinery will not convey the feeling of having seen something in operation. To see people in action is the essence of study visits.

### **Additional benefits**

Another thing to note is that study visits offer additional benefits when the receiving or host organisation is actively involved and feels pride in showing the visitors how they operate. If participants are given the reception of respected visitors, they are likely to gain more than if they feel that they are stealing a glance or disturbing the work. In addition to a positive attitude of the host organisation, it is also essential that key people who can describe operations and answer questions, will be available during the visit.

The distance between the venue and the participants' residences has, of course, practical and economic consequences. Study visits organised by a Co-operative Field Worker would, in most cases, be to an area not too far away. As a rule, longer trips in most countries require the involvement of decision makers higher up in the CFW's organisation. Planning also becomes more complicated if the CFW does not have first hand experience of the venues or cannot communicate directly with the host organisation.

The question of whether to visit one or several venues will be determined by the objectives of the visit and the availability of suitable venues within easy reach. If objectives can only be partly reached by a visit to one place, there might be a need to visit another as well. Going to several places to study the same thing will not, in most cases, improve learning; it is more a question of quality than quantity. Stopping at several places to study the same operation can jeopardize the itinerary. You may end up having quick glances at something which should be studied in-depth in one place. As a rule, a study visit should be planned to give ample time for the participants to exhaust a subject and get an answer to all questions that may arise. A relaxed atmosphere is best for learning, and when it comes to changing of people's attitudes, haste is detrimental.

In summary, the CFW must make sure that venues can be found where objectives can be fully reached by direct observation of an on-going work, and by direct communication with the key people involved. The host organisation should also be co-operative and actively engaged, and the planning should allow ample time for study.

### **3. Selection of Participants**

A study visit should include those whose behaviour needs to change to further develop or improve performance. However, if you choose too strictly, you may end up leaving out those who can actually block intended change. Bringing only "doers" (those who actually perform the task) and leaving out decision-makers can be a mistake. The situation, the problem and the objective of the visit need to be considered.

In the example of the Mathata Multipurpose Society, the CFW identified the actions (or lack of action) of workers, the Manager and the committee – all important for the problem to be solved. Consequently, the CFW has drawn the conclusion that all three parties would have to be represented in the visit.

We said previously that you formulate a separate objective for each category of participants in the study visit. CFWs will probably be able to avoid most pitfalls if they try to formulate an objective for the participants of each category which can be associated with the solutions. If a valid objective cannot be found, that category is not relevant, and can be excluded. On the other hand, the CFW might, with this technique, find that it is necessary to include a category which was not obvious at first glance. In case of doubt, it is better to take a liberal view, in particular if the decision on participation is likely to arouse the feelings of people concerned. Many study visits will, after all, have the objective to changing people's attitudes, and in such cases the CFW should tread carefully.

From a learning point of view, there is no natural limitation on the size of the group, even though larger groups, for practical reasons, would have to be split up at the venue. Study visits have been undertaken quite successfully with as many as 30 people, but quite naturally, a large proportion of the visit would then be undertaken with the group split in several smaller groups. On the other hand, the availability or the cost of transport, etc. usually sets limit to the number of participants. For these reasons it is conceivable that the CFW would normally deal with study visits of between 5 and 25 people, frequently at the lower end of the scale.

### **Opinion leaders**

Knowing that there will be limitations imposed on the number of participants, there are a few things more to consider. We dealt above with the decision on what categories to include. There may be reason to consider as well the make-up of each category. If, for example, the committee is to be represented, but it proves difficult for the whole committee to go, the CFW should ensure that the most influential representatives are selected.

In all groups there are “opinion leaders”. These are the ones who are quickest to express an opinion and often have a strong influence in convincing the rest of the group. They are often elected to such positions as committee members (though not always), and in the committee you may find that someone other than the chairman (president) has a strong influence on the thinking. Whenever representatives of different groups are selected for a study visit, the CFW should, by all means, try to include the “opinion leaders” to the extent that they can be identified. The presence of these leaders will make the follow-up of the visit and the eventual acceptance of change much easier because they are people whose word is trusted.

We have so far concentrated on cases where all participants are drawn from the same society. It is quite possible as well to organise study visits with representatives brought together from several different societies. This means usually that a single category like managers, chairmen etc. is represented.

The organisation of the visit itself will not pose additional problems in these cases, but the preparations and the follow-up would have to be different. You often find that there is need to bring the same group together both before and after the visit to make sure that the visit actually leads to later action.

The CFW (and possibly his colleagues) will have to spend time on follow-up visits. This type of study visit is frequently arranged in connection with training courses or seminars, where preparations and some follow-up activities are undertaken in the classroom. Experience shows that the follow-up action of such general study visits often leaves something to be desired, partly because much of the action is left to the participants alone, and because the overall situation in each represented society is not considered.

## **4. Logistics**

A dictionary tells us that logistics is the science of the movement and maintenance of military forces. It is often used nowadays to mean all practical arrangements in connection with education and training activities.

In the next section we deal more with the visit as a learning opportunity and how to organise it. Meanwhile there is need to say something about transport and board and lodging as well.

All study visits will of course be based on the transport of participants from one or several places to other places. Local circumstances and resources available will determine how this should be arranged, but it can be foreseen that the alternatives range from walking to flying. The quickest means of transport does not have to be used – it will depend on whether participants' occupation, the season, the society's business and other local factors allow them to spend some time on the trip itself.

The CFW does not have to accompany the participants the whole way; it is quite possible to arrange for everyone to meet at the venue or somewhere on the way. The only universally valid comment that can be made on the transport arrangements is that the CFW will be responsible for them. In the planning, the CFW must ensure that there are such safeguards and time limits, so that participants do not have to rush through the study, and the risk of missing appointments is minimised. It is always advisable to include spare time in the plans, because delays do occur and discussions and questions at the venue should as far as possible be allowed to continue to their natural conclusion.

### **Living through it**

For study visits of more than half a day, the CFW should ensure that meals are arranged by bringing food and drinks and by arrangements with restaurants at the venue. Even for shorter study visits, it would be common to arrange for some kind of refreshments. Hungry or thirsty participants can not concentrate very well. Serving refreshments at the venue also gives a natural opportunity for participants to get acquainted with the representatives of the host organisation, and the atmosphere improves among people who share a meal. This enhances learning.

Some study visits require overnight stops. If accommodation is arranged in hotels, this will, in many countries, tend to be the heaviest cost item. If the cost is too high other alternatives must be sought with the consent of the participants. It is possible that other co-operatives and their members may provide accommodation as an expression of co-operative hospitality and, in some countries, the government may allow people travelling on study visits to use government guest houses or schools. In such cases participants need to carry beddings as well.

In most cases the CFW will find it useful to produce a detailed time schedule for the visit, an itinerary, stating the time of beginning and end of each activity.



**For example:**

- 09.00 Departure by bus from Co-op Guest House**
- 10.00 Arrive at Melusa District Co-operative Society;**
- 10.05 Introduction of participants to Melusa co-operative officials**
- 10.10 Information about Melusa District Co-operative Society**
- 11.00 Visit the society's premises and warehouses**
- 12.30 Lunch arranged by M.D.C.S. at the society's premises**
- 14.00 Attend Member Information Day**
- 15.00 Leave by bus for Co-op Guest House**
- 17.00 Group discussion and organisation of notes on the day's study.**

The itinerary serves as a **planning guide** (you can check at a glance if all relevant people have been contacted and, as a **time budget** (the CFW will have to alert resource people when their time is approaching) and as information to all concerned of when they will be where: resource people at the host organisation, participants, CFW's employer, driver and people preparing meals. If many people are involved, the itinerary needs to be duplicated.

It is advisable to start the planning some 8 - 10 weeks in advance. (The decision to conduct the visit will have been taken much earlier for inclusion in annual, half yearly or quarterly plans of work etc., but here we refer to the detailed preparations). Having decided on the objectives, venue, the participants, means of transport and provisions of meals and lodging, the CFW starts work by preparing a draft itinerary. The itinerary will become more detailed as the planning goes on – departure times for cars, trains and buses are added and so are names of resource people as they become available. The final itinerary should reach the host organisation and others concerned at least 2 weeks in advance.

# 5. Cost and Benefit Analysis

Depending on the detailed decisions taken about how to conduct the study visit, we often find that the amount of money required is quite substantial in relation to available resources. Let us look at the cost items as they might appear in a budget for the visit.

1. Working time and transport for CFW
2. Correspondence, telephone
3. Transport of participants
4. Meals for participants
5. Lodging for participants

In addition, there might be costs incurred at the participating society and at the host organisation, but these items would not normally be assessed in a budget made by the organising institution.

Many organisers tend to look only for the items 3 to 5, as they might require direct payments, whereas the time spent by the CFW, his transport and the office services are treated as costs which would have been incurred anyway. There is of course some truth in this, but an organisation which is concerned about efficiency and priorities would be careful to direct time and resources to areas where the best results can be achieved. It might therefore be a good idea to include such costs as well in the budget of education and training activities.

Among the items listed above; transport of participants and lodging, if undertaken on entirely commercial terms, will tend to be the heaviest. Reducing the number of participants will of course directly affect these costs, and change of venue, type of transport and standard of accommodation will also be other alternatives.

We then know something about the costs, and have at least an idea about what can be done to keep them as low as possible. But how do we measure the benefits of a study visit ?

Let us take the example of the Mathata Multipurpose Society. The CFW has now gone further in his planning, and decided to undertake the visit with 3 workers, the Manager, and 3 Committee members, a total of 7 participants. Transport is arranged with the District Union, and no overnight stay is foreseen. This will help us to calculate the costs.

## **Value for money**

But, what are the benefits to be gained from the study visit in this case? We know that the objectives of the visit combine to improve order and cleanliness in the storage shed of the society. Of course this is a desirable outcome, if it is realised. Can we however set a value to it in money, so that we can compare it to the costs of the visit ? Yes, it might be possible, if we analyse the problem further.

The CFW was not worried about the **look** of the shed, he realised that the society was losing money because of disorder. The stock control system was not functioning (bin cards) and the society had a leakage (was losing goods) and had damages. Records and accounts show the amount being lost. If the society could reduce or remove these losses, there would be a direct economic gain from the study visit.

Let us carry the example to the end:

### Costs of study visit

1. Salary and transport for CFW:	125 =
2. Correspondence and telephone:	nil
3. Transport of participants:	55 =
4. Meals for participants:	21 =
5. Lodging for participants:	nil
Total:	<hr/> 201 =

### Benefits from study visit

Total losses on goods last year:	475 =
Expected reduction of loss through better order and cleanliness:	300 =

Most real life situations are not as clearcut as this, and the CFW would be unable to state the benefits in such exact monetary terms. The point however, is that by trying to assess the benefits in terms of money, a rough idea of the size of the benefits can be obtained.

Even if the CFW was working all alone, it would be valuable to know something of how the costs of the visit relate to the benefits to be gained from it. It would help the CFW to direct his/her efforts to the most important areas. But most CFWs are employees of co-operative or Government organisations, sometimes very big ones. Like many other people working with education and training, they have to justify the costs of activities to those who decide on budgets and estimates. A cost and benefit analysis like the one sketched above, would be very valuable to present as a basis for the decision.

This example should not lead us to think that all benefits will show up in the accounts of the society. There are also direct benefits to the members as a result of some study visit activities. If members adopt better cultivation methods, pack, prepare and sort produce better, benefits will show directly in the members' family economy. Such benefits can however also be roughly estimated.

There are of course also cases where the study visit will make it possible to reach policy formulated and development objectives by the movement or government; in such cases it may be that the benefits have already been calculated.



# IV. Organising the Study Visit

## 1. Preparations

At this stage the CFW will already have formulated objectives, decided on the venue, the participants and the logistics, and will have had the approval of the budget for the study visit.

If possible, the CFW should visit the venue and talk in person to the representatives of the host organisation about the preparations.

The host organisation should be made aware of the objective of the visit – i.e. what is expected from participants afterwards. This will help them to emphasise the right things – such as important parts of a process or the problems experienced before a certain new method was introduced.

The CFW must satisfy himself that the object of the study will be in operation and possible to observe at the time of the visit. The CFW will also try to talk to those involved in the actual operation and identify the “key” people, and ensure that they are able to describe the operations simply and clearly. Sometimes it is not necessarily the supervisory staff who can best describe the subject. It might be better to find an experienced person who is actually doing the job. Generally, it is important to include resource people with whom the participants can easily identify, and if such people are not directly involved it might be a good idea to arrange for participants to meet their “counterparts” for a while.

In cases like that of Mathata Multipurpose Society, the CFW might arrange for the workers to have a session with the other society’s workers, the committee with the other committee and the manager with his colleague.

It is important that CFWs familiarise themselves beforehand with the whole process of operation during preparations. This may be valuable during the visit itself, if unforeseen circumstances lead to omission or if key people are absent, in which case the CFW can supply missing information or ask follow-up questions. Such familiarisation can also form the basis for discussions on how the visit should be timetabled.

Where the visit is organised to improve performance in an existing operation, the CFW will try to identify where the difference between the “undesirable” performance and the desirable one can be most clearly shown, and ask the hosts to emphasise such areas. Where the visit goes to a venue where new methods have been introduced, the CFW should arrange for comparisons between the old and the new, if possible through direct demonstrations.

## **Test runs**

After the CFW is familiar with matters, the detailed design of the visit based on known objectives is to be discussed with the host organisation. If the visit includes walking around between different work areas, a “test run” could be made with a representative to discuss what should happen at each location. The test run might identify problems of space, noise or temperature and such places could be avoided. It is inadvisable, for instance, to explain how a machine works by standing in front of it, if the machine’s noise hinders the group from listening to the person explaining its function.

Returning to the Mathata Society, we find that the CFW has analysed and familiarised himself with the operations of the storage shed at the venue. He has found that the most important points in the operation for the maintenance of order and cleanliness are when goods enter and leave the shed. He notes that bringing out of goods can be seen any day when members purchase supplies, but realises that he must time the visit to coincide with delivery and reception of goods from the supplier to cover all aspects.

The study of goods reception includes checking items received against delivery notes, of loading trucks, the check on the “address” of the goods in the shed (their designated place as per inventory), the transport of the goods to allocated places, stacking, piling or shelving, filling in bin cards, and the final check of documents against bin cards before leaving papers with book-keepers.

The study of goods-out includes handling customers, taking orders, collecting goods and entries on bin cards, transport to the entrance, writing receipts, and checking orders against receipts with customers.

While studying the premises, the CFW notes that the inventory giving the allocation of goods, is so placed that only one person can see it at a time and therefore, suggests that it be brought outside the shed during reception of goods so that the participants can see how workers consult it before bringing goods in. He realises that some members feel embarrassed by a detailed study of their purchases and therefore arranges with committee-members of the host society to buy a few test items during the visit. This avoids upsetting uninformed members.

The CFW arranges with the senior warehouse man to describe routines to be followed, before they are studied while being carried out. He also arranges for answers to participants’ questions after the two issues of goods in and out have been covered: one question session after each routine.

The workers would study in more detail the operations inside the shed and get a chance to exchange views with their counterparts. The senior warehouse man is advised to emphasise the checking of the inventory before bringing anything in; to maintain order in bins and stacks (e.g. the “first in – first out” method), and the completion of bin cards.

The meeting between the two managers should give the Mathata manager a full overview of operations on paper (with samples of documents), and concentrate on what to check daily, weekly and monthly in the shed in order to maintain the system. The CFW realises the crucial importance of the manager adopting new approaches, and therefore plans to sit in on much of this session.

The committee of the host society should inform the visiting committee members of improvements and the advantages of the new system. The CFW attends the opening of this meeting to ensure that it is on the right track. The CFW suggests that the manager gives a talk on the importance and advantages of "modern warehouse management". If he is convincing, the manager could give another talk to all participants as a round-up after the special session.

After preparations, the CFW checks on objectives stated for the visit and finds they can be reached satisfactorily, with an eye on events during the visit itself. (The reader can refer back to match the objectives with the above plan).

### **Speech making**

Preparations at venues should include opening and closing addresses by representatives of the host organisation and participants. The opening speech is a good opportunity to present all aspects of the host organisation – i.e. the type of business it engages in, the results it has achieved, membership and member response and participation.

One way communication – like speeches – should be to the point and their length should be agreed and stated in the itinerary. Too brief speeches and introductions can be remedied by follow-up questions, but long talks tend to exhaust participants and make them less alert and receptive during the actual study. The CFW could, whenever he thinks fit, suggest the use of visual aids such as boards, charts, and drawings during the initial presentation of a process of work, etc.

After all practical arrangements have been agreed, the CFW will draw up the detailed itinerary for the venue, and ensure that the host organisation is aware of their tasks and when activities are to take place.

### **At the Society**

There are preparations to be made at the participating society or societies as well. The CFW would have to arrange at least one meeting with participants to brief them fully, and the objectives should be described at least in general terms. Sometimes it is necessary to arrange several meetings at different stages of preparations to inform the society about progress.

When the selected participants represent a given category, it is also necessary to brief a larger circle at the society, to get them involved so that they see participants as representatives. Whether this should mean that participants are directly elected depends on circumstances. But the CFW should make it a point to involve a sufficient number of people in discussions on the subjects to be studied and emphasise that participants will report back to those not going. From advance discussions, the CFW will be able to take note of important questions that participants should ask at the venue. If individual participants have not been named before such discussions take place, the CFW will have an opportunity to judge those suitable, by observing their contributions to the discussions (See also chapter III section 3).

The participants must be briefed in detail on all aspects of the itinerary, so that they are mentally prepared for what is going to happen. People on study visits often have a tendency to lose initiative and become passive. It is therefore important to brief them well in advance to counteract feelings of dependency and instil a feeling of being in control of the situation. Alert and active participants gain more from a study than a group behaving "like a flock of sheep". An important principle in adult education is that participants are treated like mature individuals

Knowing exactly what is going to happen during the visit will help to strengthen participants' self confidence. Likewise, it may be a good idea to repeat the itinerary: at the beginning of the visit, on arrival at the venue, and at the beginning of each day for longer visits, regardless of whether participants are literate and have been given copies of the itinerary or not.

### **Briefing**

Participants should be given a chance to digest information given, and then be allowed to ask for clarification from the CFW who might explain the reasons for certain items or certain points on the itinerary.

The need for participants to prepare themselves by bringing certain papers or equipment or preparing introductory talks, would have to be stressed. They should also be briefed on reporting and follow-up action when they come back.

If the CFW feels that the process or operation to be studied is new or has not been sufficiently covered, there might be reason to give a presentation at the society to make sure that participants are able to follow the technical presentations at the venue.

A CFW who is familiar with the venue will know what to emphasise and can concentrate on aspects easy to overlook on the spot. There may also be more time at the society to cover the basic functions, so that participants at the venue can concentrate on specialised and advanced questions. Such advance briefings also serve to bring participants up to comparable levels of understanding – those less familiar with the subject will learn from those who are more advanced. This is important in groups of mixed make-up (e.g. "doers" and decision makers).



## 2. The Study at the Venue

There are no exceptions to the rule that organisers must be present during actual study at venues. The CFW as an “agent of change” and a learning facilitator has a crucial role.

We have already described the itinerary as a timetable and the CFW should strive to keep to the times indicated or, if changes are necessary, to concentrate on important parts of study at the expense of social features. The key word is **facilitate** and what should be facilitated is the exchange between the participants and resource people. The CFW will best be able to maintain a low profile and still gently direct the chain of events by cultivating **a question technique**.

If a resource person should drift to a side issue, or if participants’ questions lead away from the subject, the CFW may, by asking relevant questions, get the discussion on the right track again.

Discussions in the society before the visit will also help the CFW to bring up issues which the participants might be too shy or too polite to raise themselves, in particular, to highlight reservations the participants have expressed against adopting new ways.

If the CFW realises that participants who previously have expressed strong views on an issue are not forthcoming, he can nudge them gently into asking questions.

As said previously, if the CFW cannot convince participants at home; it might help to hear it “straight from the horse’s mouth” – i.e. from people who have a personal experience. Unless fears and reservations are brought out in the open, participants might not change previous attitudes, even after the visit. There is always resistance to change, and participants may not ask certain questions because they are afraid that they will change their minds.

### **A Realistic approach**

For similar reasons, the CFW should guard against a too bright and glossy picture of the subject under study. If resource people give an impression that everything is perfect, and no problems exist or have existed, participants might get a feeling that they may not reach their objectives. It is therefore advisable for the CFW to ask about problems experienced or get participants to ask such questions.

The CFW should try to find out about present or teething problems during his preparatory visit to the venue, so that he can prepare questions on such issues. The CFW should make it a point to highlight the development stages that have to be passed.



The CFW should aim at the creation of a relaxed atmosphere. Both participants and resource people might have a tendency to become stiff and formal, and in the case of resource people it may lead to too much technical or theoretical talk. Unless resource people talk to professionals in their own field, the CFW should get simple explanations and try to assist by likening a process, etc. to participants. Many problems can be overcome by briefing the resource people, in advance, about participants and their backgrounds.

Participants who feel uneasy will tend to be passive, shy and quiet. The CFW must try to encourage a spirit of free and open exchange of views. He should allow things to run their course.

The CFW should follow the reactions of participants with the objective of the visit in mind, and try to encourage learning when he sees that participants do not get the point. Preferably, by asking follow-up questions. The CFW should however abstain from trying to convince participants by directly entering into debate with them. Full use must be made of the resources at the venue, and the CFW will have his chance to talk during the follow-up in the society. Participants should see things through their own eyes, and be helped to see for themselves.

Ending the visit at the venue need not be formal unless the host organisation strikes that note. It is enough to thank the hosts for their efforts, time and hospitality. In many cases, it is appropriate to ask a participant to give a vote of thanks.

### 3. Action-oriented Follow-up

The visit starts and ends at the society or societies whose performance should be changed through the visit. The CFW cannot neglect the problem after the visit. He must remain persistent to make the people concerned take action. The first step to take after the visit is to arrange for **reinforcement** of the learning. This means that a meeting with participants should be arranged quite soon after the visit, to recall what happened, to clarify outstanding issues and summarise findings. On this occasion, some participants or the CFW should again describe the process or operation studied at the venue and the important points should be stressed. It may also be feasible in some cases to study in detail how the society's present way of doing things compares with the operation that has been studied. In the case of operations new to the society, documentation collected, drawings of the venue or other visual aids may be used.

The next step is that the society should **take action**. The CFW would have to arrange for a meetings with those who decide issues – in most cases, the committee. The CFW may find that the committee or others need more clarification. There might be need for more discussion before change can occur. The CFW has to explain what else can be made available – e.g. investment loans, staff training, handbooks and other information. In some cases the society may decide, without reservation, to adopt changes and, in other cases decide to take steps towards change. Persistence and concern for the welfare of the society will be important in reaching the objectives.

Even after the society has decided to adopt change, the CFW will have to assist further when necessary and monitor progress closely for some time. The more attention and support the society gets, the greater the chance of achieving the desired performance.

Let us, for the last time, return to the Mathata Multipurpose Co-operative and see what happened to their study visit. The study at the venue went well (even though the CFW had to ask some clarifying questions from the manager of the host society who was quoting too heavily from a textbook on supply management and therefore was asked to explain a few things in simpler language), and three weeks later the CFW arranged a follow-up meeting.

#### **Standardisation in storage**

A meeting is held with all participants and the remaining committee members, and the manager presents the events at the venue and the findings. One of the workers explains the most important points of what they learnt on their study visit.

The CFW emphasises that it is when goods are taken into and out of the shed that the staff have to follow a set routine. The committee then arranges a meeting with the workers in attendance, and discusses follow-up action.

The committee ask the CFW if there is a common system in operation for receiving goods and keeping of bin cards, and the CFW explains that there is a bin card system only. However, the system used at the host society is quite appropriate. The committee then decides that the manager should implement the system studied and improve the keeping of bin cards with the co-operation of the workers, who are asked to follow the procedures of the host society. As the Chairman puts it: "In a year from now, I want us to be able to receive a study visit ourselves to show how a storage shed should be kept".

The CFW helps the manager to open an inventory showing where all goods should be placed (during the next stocktaking). With the manager and the workers, he goes once more through the procedure of making entries in the bin cards. He is present the next time goods are received and, on this occasion, hands over a written outline he has made of all the steps to be taken when receiving and bringing in supplies into the shed.

During the following six months, he asks the manager on each visit how the system is being maintained. He then goes with the manager to the shed to check the order and entries on bin cards. Satisfied that the objectives have been reached after some six months, the CFW can then concentrate on other problems. The last check to be made in this case is whether the loss of goods as reflected in the coming final accounts has been reduced.

# V. Check-list for the Organiser

The following is a brief itemised list of different steps to follow when planning and organising a study visit. It might be used by the organiser to tick off steps as they are being carried out, or as an aid for the memory.

## A. Feasibility of the Study Visit

- Identify **performance** or **development problem** in the society
- Describe **desired** and **actual performance**
- Set a performance objective, i.e. describe what you want people concerned **to be able to do**.
- Study different methods or tools to use for achieving the objectives, and decide if a study visit is feasible.

## B. Planning the Study Visit

### *Objective*

- State the detailed objective of the visit, if necessary for each category of participants. The objective should be a description of what participants should be able to do afterwards, in other words, a description of the **desired performance**.

### *Venue*

- Find and decide upon venues for the visit where **objectives** can be observed as an ongoing process and by direct communication with key people involved in the operations. Ensure that host organisations are committed and co-operative, and that ample time can be allowed for study.

### *Participants*

- Decide composition of group and number of participants. Ensure, if possible, that representatives are “opinion leaders”, and guard against excluding those that can block change in the society.

### *Logistics*

- Plan logistics of the visit: transport, meals, refreshments, and accommodation if necessary. Make bookings, and purchases after approval of programme and expenses.

### *Itinerary*

- Prepare an itinerary for the visit, with an itemised timetable of all events. Duplicate and distribute itinerary well in advance.

### *Budget*

- Draft a budget for the visit and submit it for approval. Support the budget whenever possible by a cost and benefit analysis showing the costs in relation to expected benefits of a successful tour. Adjust budget if necessary by rearranging the logistics and number of participants.

## **C. Preparations at the Venue**

- Familiarise yourself with the whole process or operation that should be studied. Follow the flow or the different steps, if possible by walking around the premises while the work is going on.
- Get to know the key people involved in the operation – i.e. those who perform tasks important in relation to the objectives of the visit. Identify among them resource people who can present the job or routine in a straightforward and clear way. Look in particular for people with whom the intended participants might be able to identify themselves.
- Identify the parts of the operation that should be studied in detail and work areas where participants should stop and study in detail different aspects.
- Ensure that the process is in full operation during the proposed time for the study visit, and that key people are on duty.
- Draft an itinerary for the events at the venue and if necessary a drawing indicating the movements of the study group on the premises. If the visit is complicated, make a test run with a representative of the host organisation and take joint decisions on suitable work areas with regard to noise, space, temperature etc.
- Discuss with host organisation arrangements for special group meetings, appointment of resource people for presentations and meetings, opening and closing addresses, meals and refreshments. Agree on the itinerary with the hosts and ensure that there are no misunderstandings on who is responsible for what. Send final itinerary to all key people without delay.

## **D. Preparations at Society/societies Participating**

- Brief all people concerned with solving the basic problem about the objective in general terms, the broad outline of the itinerary, and the fact that a smaller group will participate and report back. Discuss the problem and the objective and take note of pertinent questions to be answered during the visit.
- Finalise selection of participants if this has not yet been done.
- Brief the participants in a separate meeting on the objective, the detailed itinerary, the preparations required of them, and the planned follow-up action back in the society.
- If feasible and necessary, give advance technical briefings on the process or operations to be studied. Where feasible involve more experienced and knowledgeable participants in the briefing for less advanced participants.

## E. The study Visit at the Venue

- Use the itinerary as a timetable and try to follow it as closely as possible. In case of unavoidable changes, give top priority to the technical parts of the study as indicated by the objectives at the expense of “social and touristic” activities.
- Gently direct the chain of events during presentations, talks and discussions, by using the question technique. Lead resource people back to the main subject and ask clarifying questions when presentations become theoretical or technical. Assist participants by asking relevant questions and by bringing out in the open their fears and reservations for the resource people to react upon. Ensure that questions asked during briefing sessions in the participating society are being answered. Keep objectives in mind and ensure that resource people cover all aspects of the objectives.
- Bring out through questions, problems earlier experienced at the venue in order to highlight steps or stages of development that have to be undertaken. Guard against a too smooth picture of operations to avoid doubts among participants on their ability to reach objectives.
- Create a relaxed atmosphere to facilitate learning. Avoid haste; give participants a chance to collect their thoughts and formulate questions. Meals and refreshments, and appropriate jokes here and there help.
- Keep low profile and let others do most of the talking. Facilitate the exchange between participants and resource people. Do not try to convince participants by entering into debates with them at the venue; try to make resource people do it. Make the fullest possible use of resources at the venue while there, to cover all parts of the objectives.
- If it comes to formal or semi-formal ending, it may be appropriate to let one of the participants give a vote of thanks.

## F. Action-oriented Follow-up

- Reinforce learning back in the society. Hold a meeting with participants to repeat and summarise what you have gone through at the venue. Use visual aids when possible, and involve participants actively by letting them talk about the visit with summaries. Compare the society's way of doing things with how things were done at the venue.
- Report back to the larger circle of involved people in the initial briefing, either by combining the reinforcement meeting with the reporting, or by holding a separate meeting.
- Hold a meeting to decide on further action by the society. This may either be a separate meeting with the committee and manager, or a continuation of another meeting as described above. Ensure that the society's representatives commit themselves to continued action, either to adopt change as proposed or to take steps towards such change. Give additional information as required, and talk about the need for additional efforts to implement change. Even if objectives cannot be fully attained at once, remain persistent and move towards it step by step.
- Give continued support to the implementation of new and changed systems and routines by further inputs and by monitoring the performance until objectives are reached.

# VI. Possible Study Visits

In this manual study visits are seen as instruments for achieving change and further development in co-operatives, rather than ends in themselves. The situations where they can be fruitfully used are therefore confined to mainly two categories: (a) to improve the performance of people in the society in doing their present job or functions and, (b) to introduce new services or entirely new ways of doing things.

In the hints below, the first category are called **performance oriented visits**, and the second **development oriented**. If we widen our perspective outside the individual primary or secondary society, we find that there is a special category of study visits which aim at improving interaction and co-operation **between** societies. This is really a special case of performance oriented visits, but still we will treat them as a separate category under the heading **relation oriented** visits. In this category we include relations with trading partners outside the co-operative sector, which in many cases tend to be parastatals or public companies.

There are, of course, general educational visits as well and, even if they fall outside the scope of this manual, we want to emphasise that such visits can be used by societies themselves to improve the general level of education among the members and help them to cope with social and economic situations.

In such cases the visit forms part of the educational services provided by societies to their members, in the same way as classes and study groups on fundamental topics such as home economics, health, childcare, etc. Such visits however would normally fall outside the job of a co-operative field worker concerned with societies' performance, even though he may advise societies on how to organise them.

The following list, while far from being complete, may give a few hints on subject areas in different co-operatives where study visits could be considered as a means to reach performance and development objectives. The reader is however also reminded of the general description of the usefulness of study visits in the chapter "The Study Visit as a Tool".

# 1. Performance Oriented Visits

- *Agricultural cooperatives*
  - **Marketing of produce:** Layout and disposition of crop receiving area, division of tasks and staffing for weighing, grading, issuing of receipts etc., double checks and control measures, coping with queues and congestion, temporary storage, etc.
  - **Supply services:** Layout and disposition of storage sheds, godowns, warehouses, lock-up stores, fittings, fixtures and shelving arrangements; conveying of bulky and heavy goods, control routines, pest control, receiving, collecting orders, etc.
  - **Processing:** Re-packing, baling, sorting, de-hulling, threshing and milling, drying, mixing blending, etc.
- *Consumer cooperatives*
  - **Shop layout and disposition:** placing of and design of shelves and gondolas, grouping and subdividing goods; direction signs and internal marketing activities in self-service shops; equipment use and maintenance; measures to reduce theft, wastage and breakage; specialised departments like hardware and software, etc.
  - **Shop routines and systems:** Receiving of goods, storage, shelving and display; cleanliness and hygiene; leakage control, handling of fresh produce etc.

# 2. Development Oriented

- **Pre-investment studies:** Size, location, design and layout; operation and use of shops, warehouses, sheds, collection points, mills, packing and baling equipment; dryers, conveyors, pumps, livestock dips, etc.
- **Pre-implementation studies:** Systems for stock-and leakage control; reception and marketing of new crops or other types of produce; introducing supply of groups of goods requiring special treatment.

# 3. Relation Oriented

- **Down the line** (follow produce or products towards the consumer): To the marketing union or board etc. to see production systems and costs; bulk storage, railway depots, sorting and grading, weighing, identification of produce with producer or society, processing, etc. It would be particularly valuable to study how the grading and pricing relate to the processing or manufacturing, – i.e. why certain grades etc. are in any sense “better”.
- **Up the line** (follow goods, inputs etc. towards the producer): To the wholesaler or manufacturer to increase understanding of pricing structures; reasons for shortages; get an overview of goods in stock and improve knowledge about products etc.



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