

MATCOM

■ NOTES FOR THE FIELD TRAINER

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by K.K. Taimni



MATCOM
Material and techniques for cooperatives management training

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

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

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NOTES

FOR THE FIELD TRAINER

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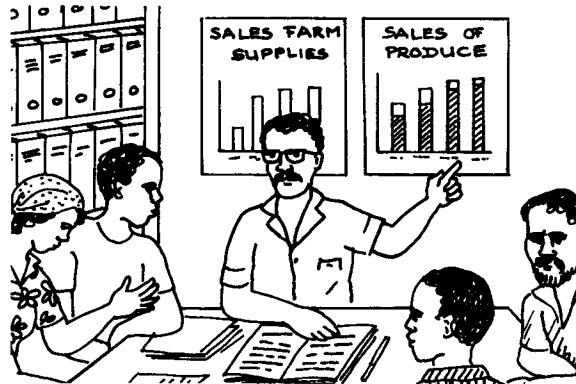
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INTRODUCTION

This is a manual for field workers responsible for the training of committee members and staff of primary agricultural co-operatives.

The manual provides guidelines as to how to plan and carry out training activities. It discusses methods for assessing training needs and systems for organising training in the field, with particular emphasis on the use of "MATCOM Learning Elements" - special self-study booklets for staff and committee members of agricultural co-operatives.

The work of the leaders and staff
of an agricultural co-operative:



*preparing plans and budgets
and maintaining the books,*



*organising credit and
supply services,*



*organising receipt and
storage of produce,*



organising transport,

*... plus marketing, information, member
education and many other things.*

ASSESSING TRAINING NEEDS

An agricultural co-operative is an association of farmers doing business together - purchasing farm equipment, seed and fertilizer; arranging transportation, collection, storage, and marketing of produce; mobilizing savings and advancing credit; in general, providing whatever is needed to increase the income and improve the condition of the farmer-members.

The success of such a co-operative, however, depends to a great extent on the ability of its leaders (the committee members) and staff who look after the day-to-day business. They must be hard-working and seriously committed to the common goals of the co-operative, and must have the special skills and knowledge their work requires.

The pictures on the opposite page illustrate some of their most important tasks.

If a co-operative is not performing well (its members are dissatisfied, it is operating at a loss, or its business is declining), it is quite likely that it has a weakness somewhere within these key areas. The co-operative can be helped only if the exact causes of the problem can be identified.

The weakness may be due to inadequate knowledge and skills among committee members or staff, lack of interest on their part, or such outside factors as changes in government policies.

Specific training can correct a lack of knowledge and skills and foster a sense of professionalism. Other causes of co-operative failure may require different remedies.

METHODS OF ASSESSING TRAINING NEEDS

There are a number of ways by which the training needs of a co-operative can be determined. Among the most convenient are:

- personal observation and informal discussion with members, committee members, staff and colleagues;
- study of co-operative accounts and reports;
- individual interviews with committee members and staff, based on their job specifications.

Personal observation and informal discussion

The fact that you are a field worker means that you know the co-operatives in your district very well. You are in a position to see for yourself the actual workings of the co-operatives. Furthermore, you know many of their members and most of their leaders and staff. You hear opinions about the various societies from all levels,, management and members, insiders and outsiders. This is very informal, useful input; it offers you some idea as to potential training needs in different groups.

What you observe may confirm what you are told. Actual office management, trading procedures, maintenance of books,



staff behaviour, care of stock, transport scheduling, and the like may reveal weaknesses in these operations - perhaps due to lack of training.

Your personal observations form a necessary basis for your training needs assessment, but you must certainly continue your analysis in a less informal way.

Study-of -accounts -and -reports

You analyse the accounts of a society to pinpoint its weaknesses. The accounts may reveal unsuspected problems or confirm something you have suspected for some time (for instance, that transport arrangements are too costly or erratic; or that income has dropped with the quality of produce). The accounts reflect only results; with the co-operative management, you need to determine the causes of a given problems. (Was the transport poorly planned, so that partial loads rather than cost-efficient full loads were driven? Were pick-up dates for transport adequately publicized? Did produce lose quality due to improper storage?) Through your analysis of the accounts it is very likely that you will discover such areas of training need.

Other documents can be used to assess weaknesses and training needs, as well (for instance, operating statements and reports prepared regularly for the committee by the manager; minutes of meetings; and reports of auditors and other inspectors). You should study all such reports carefully, analyse each difficulty and ask yourself: would training solve the problem?

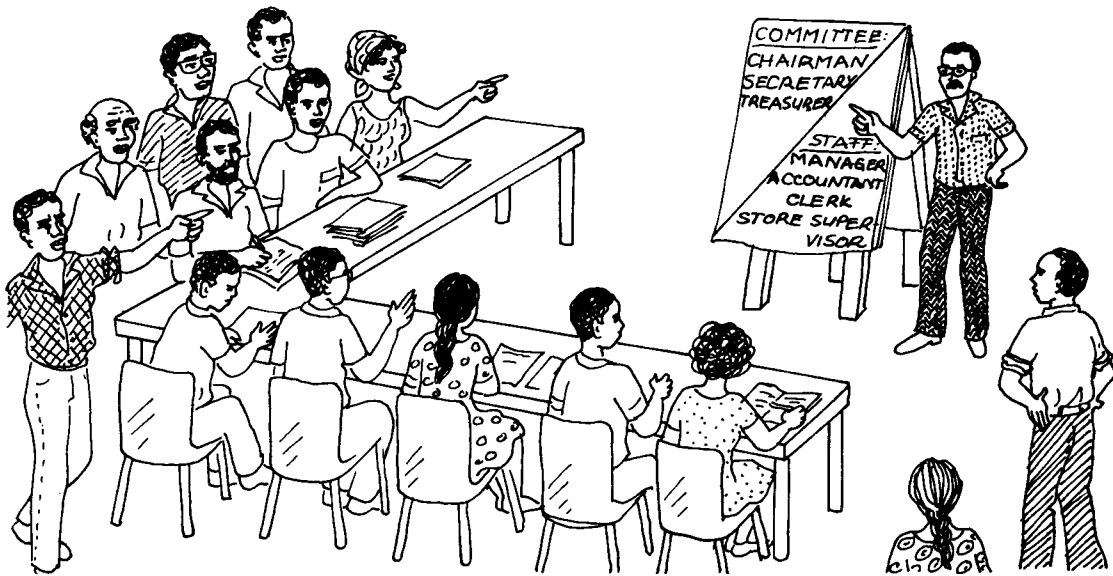
Individual interviews with committee members and staff

You cannot determine the training needs of co-operative personnel - and committee members - until their job specifications are clear. If they do not know exactly what the job

entails, they cannot know if they have the training to do it or not. Even then, some of them may simply not know that there are other and better ways of doing their jobs. People must be sure exactly what their jobs are. (It sometimes happens in co-operatives that people trust that "someone else" is responsible for certain jobs which they, in fact, should have carried out themselves.)

Before you attempt to assess training needs through interview, therefore, it is advisable to arrange a joint meeting with the committee and the staff of the society to discuss two important questions:

- What are the jobs to be done?
- Who is going to do them?



It is important that everybody knows his own tasks and responsibilities and also appreciates the roles of other people, both management and staff. This fosters collaboration and avoids unnecessary interference in others's work. For you - as adviser and trainer - it facilitates the planning of a suitable programme of counselling and training for those who need it.

As a basis and a structure for the discussions, you can use the list of tasks included in the reference section (pages 29 - 41). Ideally, you, together with the committee, the

manager and the staff, should work out job specifications for all people engaged in the management and the day-to-day work of the society. If everyone is involved in these discussions and decisions from the beginning, it is likely that motivation, sense of responsibility and job satisfaction will be much higher than in an autocratic system where everything is decided by one person.

GENERAL RESPONSIBILITIES OF THE COMMITTEE

1. Plan and establish the broad policies that guide the business operations and see that the manager carries them out.
2. Select and hire and remove the manager.
3. Clearly define the manager's authority and once so defined, exercise his rights.

... reports and financial statements from ...

... accounts receivable, short term and long term investments, amounts and kind of insurance.

... whether the management ...

JOB SPECIFICATION

JOB TITLE: Manager

PURPOSE: To conduct and manage the day-to-day affairs of the Society in accordance with the provisions of the Societies' Law, regulations and the decisions of the Committee.

RESPONSIBLE TO: The Committee

RESPONSIBLE FOR: The Society's assets and liabilities.

JOB SPECIFICATION

JOB TITLE: Warehouse Supervisor

PURPOSE: To assist the Manager in the day-to-day management of the warehouse supply services and to manage the warehouse staff.

RESPONSIBLE TO: The Manager of the Society.

RESPONSIBLE FOR: The warehouse, equipment and staff.

SPECIFIC DUTIES OF THE SECRETARY

1. Prepare for the Committee's regular meetings, including:
 - sending notices/reminders to committee members at least seven days before the date of the meeting;
 - preparing the meeting room;
 - preparing copies of the minutes and reports.

JOB SPECIFICATION

JOB TITLE: Accountant

PURPOSE: To supervise the processing of financial and operational information.

RESPONSIBLE TO: The manager.

RESPONSIBLE FOR: The society's books of account.

DUTIES:

1. Ensure that all economic transactions are properly recorded and that the accounts are kept up to date, with a view to the preparation of the annual financial statements.

JOB SPECIFICATION

JOB TITLE: Transport Supervisor

PURPOSE: To provide transport services.

RESPONSIBLE TO: The Manager of the Society.

RESPONSIBLE FOR: The society's vehicles, garage building, maintenance facilities, transport documents and transport staff.

DUTIES:

1. To allocate transport as required to the other sections of the society.
2. To coordinate with the other sections so as to ensure effective utilisation of vehicles.
3. To prepare and submit the transport section's annual budget.
4. To purchase and arrange the purchase of new vehicles and to replace old ones.
5. To control the purchase and use of spare parts and to ensure that proper maintenance and repair of vehicles is carried out.
6. To assign duties to subordinate staff, to supervise and manage them.
7. To participate in the selection and recruitment of subordinate staff.
8. To ensure that all vehicles are legally licensed and insured.
9. To ensure that proper records are kept of the transport section's vehicles.
10. To report periodically to the manager of the society.
11. To ensure maximum safety for the staff of the transport section.
12. To see to it that in case of accidents appropriate action is taken.

JOB SPECIFICATION

JOB TITLE: Cashier

PURPOSE: To ensure that all cash is handled, recorded and kept in such a way that no loss will occur.

RESPONSIBLE TO: The Accountant.

DUTIES:

1. Receive and pay out cash as instructed by the Accountant.
2. Prepare and complete appropriate documents for every cash transaction.
3. Ensure that members/customers receive receipts as prescribed.
4. Keep copies for the societies as prescribed.
5. Complete at the end of each day the cash reconciliation form and submit it to the Accountant together with the cash.
6. Maintain the cash counter in an orderly, clean and safe way.
7. Report any irregularities to the Accountant.

When everybody has agreed on the jobs to be done, how and by whom, you can begin the individual interviews. Your aim is to find out exactly what the staff and committee members need to learn and how they can use your assistance.

Use the relevant job specifications, which now should be available. Go through all items on the list. Try to establish what your "trainee" thinks about the actual task, how he wants to do it, what he feels confident or unsure about, and so on. On the basis of this information, you can plan your assistance and training input.

SPECIFIC TRAINING NEEDS

You may discover that the training needs of the committee members differ from those of the staff. Every committee member, for example, is not required to keep books, although there must certainly be a person in the co-operative trained to carry out this job.

The roles and functions of committee members vary from place to place, although their overall responsibility for the operations of a co-operative remain basically the same everywhere. In some smaller societies, they may perform all managerial tasks themselves and be involved in the day-to-day work, as well. Other larger co-operatives may have a general manager and several staff specialists employed, leaving committee members to concentrate on policy matters, planning and control.

Taking into account the actual situations in your co-operatives, it is your job to assess the training needs for all committee members and staff.

TRAINING SYSTEMS AND ARRANGEMENTS

Once you have determined the training needs in the co-operatives in your area, it is time to start thinking about how you can offer training to those who need it. Training can be given in many ways, even by a field trainer with limited resources. The basic approach, the timing and the venue, as well as the methodology can vary. Let us discuss some of the more common possibilities.

TRAINING APPROACH - INDIVIDUAL OR GROUP?

You must first decide whether to work with your trainees individually or in groups. There are advantages to each approach.

Individual training

The new staff member is normally taught on the job, "learning by doing" under the supervision of an experienced manager. The method can be very effective if the supervisor is able to give instructions and guidance in a positive way. It also allows the business of the co-operative to continue uninterrupted, whereas a more formal training course takes both trainer and trainee away. In some co-operatives, especially new ones, there may be no experienced supervisor, so you - the field trainer - must provide the individual training, working closely with both committee members and staff. Many important procedures can be taught on the job, for instance, record keeping and cash and stock control. Specific problems can be discussed in detail and the pace of learning can be set to suit the trainee.

The primary disadvantage of individual training is that, by definition, it can only be offered to a limited number of people. Its one-on-one nature is time-consuming to the trainer - he might, in the same period, reach an entire group of trainees.

Grout-training

The group approach allows for the training of a larger number of people in a given interval - yet they may have to meet away **from the** work place, inconveniencing the co-operative members.

Your first task as a group trainer is deciding how you should make up the groups.

If you discovered training needs common to both the committee members and the staff in a particular society you can arrange a common programme for all of them. This cannot only save you considerable time, it can develop a common understanding among committee members and staff.



But, as we noted on page 10, in many cases training needs are different for committee members, managers and staff in terms of content, emphasis or coverage. In this case, you would have two or three **different** "target groups" for training.

Their separation might be essential if the training is to meet the specific needs of each group.

Other important factors might also favour the separate training of committee and staff - for example, the level of literacy, or social and psychological factors.

There are many group training patterns. You might be able to arrange joint group training for participants from different co-operatives, depending on the situation in your district. You might, for instance, select groups according to specialization and have a group of clerks (or managers or warehouse supervisors) from different co-operatives meet for a short training course.



Such "specialization" facilitates the training of a large number of people in a relatively short period of time. There is a homogeneity among members of the group; they have similar jobs and interests and can learn from each other through personal interaction and exchange of experiences. The knowledge and skills being learned can be put under group scrutiny.

TIMING

A training event, organised in the field for a group of people on a specific topic, need not last long - one or two days at most. If the trainees live in the same area, it might also be possible to meet for a few hours daily over one week, or to meet once a week over a period of time.

The next training topic might then be brought up after an interval of some months. This ensures that the trainees are not absent from their work too much. Such timing is based on the theory that they will profit more by training "served in small portions" than from longer comprehensive courses.

VENUE

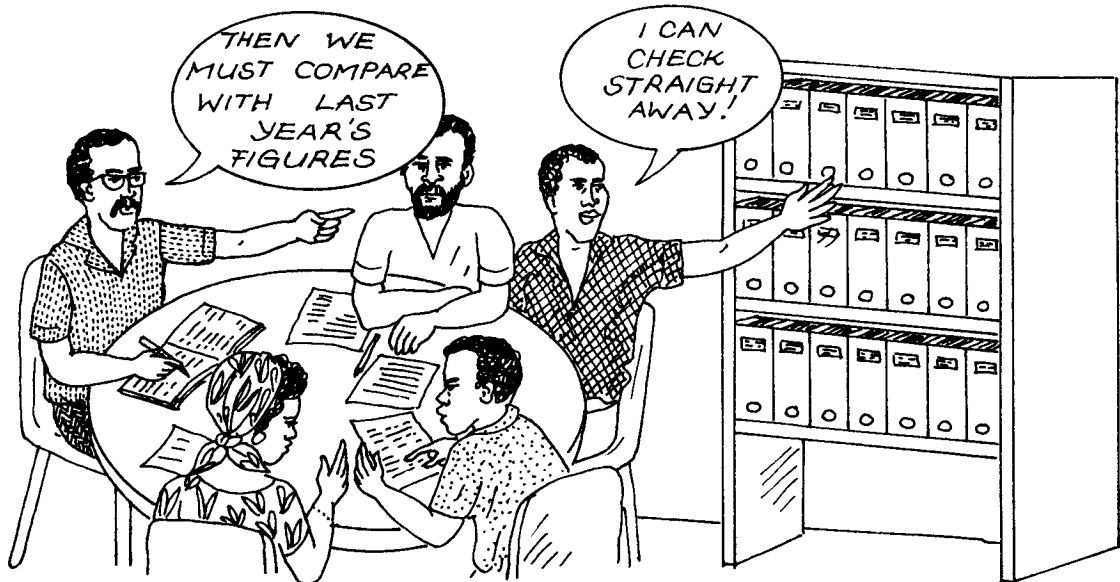
Where should the training be carried out? Basically you have two alternatives:

- at a specific co-operative (for training its own personnel); or
- at a common facility - a centrally located co-operative, a school, a community centre (for training personnel from several co-operatives).

Training - at - a - specific - cooperative

When you organise training of committee members and/or staff in their own co-operative, the training can be focussed to meet their specific needs. You can devote more time to discussing individual problems and the actual work procedures practised in the co-operative, pointing out specific areas where immediate improvements can be made by trainees. Committee members and staff may even attempt to implement the agreed-upon improved practices under your guidance.

trainees, or arrangements for food. Training under this system becomes informal and can be arranged when it is most convenient to participants. The co-operative may not have to be shut down during training.



*** TRAINING AT A SPECIFIC CO-OPERATIVE**

But the "in-house training" does mean that you will have to spend a few days solely for the benefit of a particular co-operative. You may even have to stay there for a few days.

Training at a Common facility

When you arrange for training at a common location - perhaps with participants from a number of co-operatives - you will have to settle a few issues before starting.

While deciding on the venue, you must ensure that it is suitable for training. (Will the trainees be unduly disturbed? Can they easily commute to the location from their work places?)

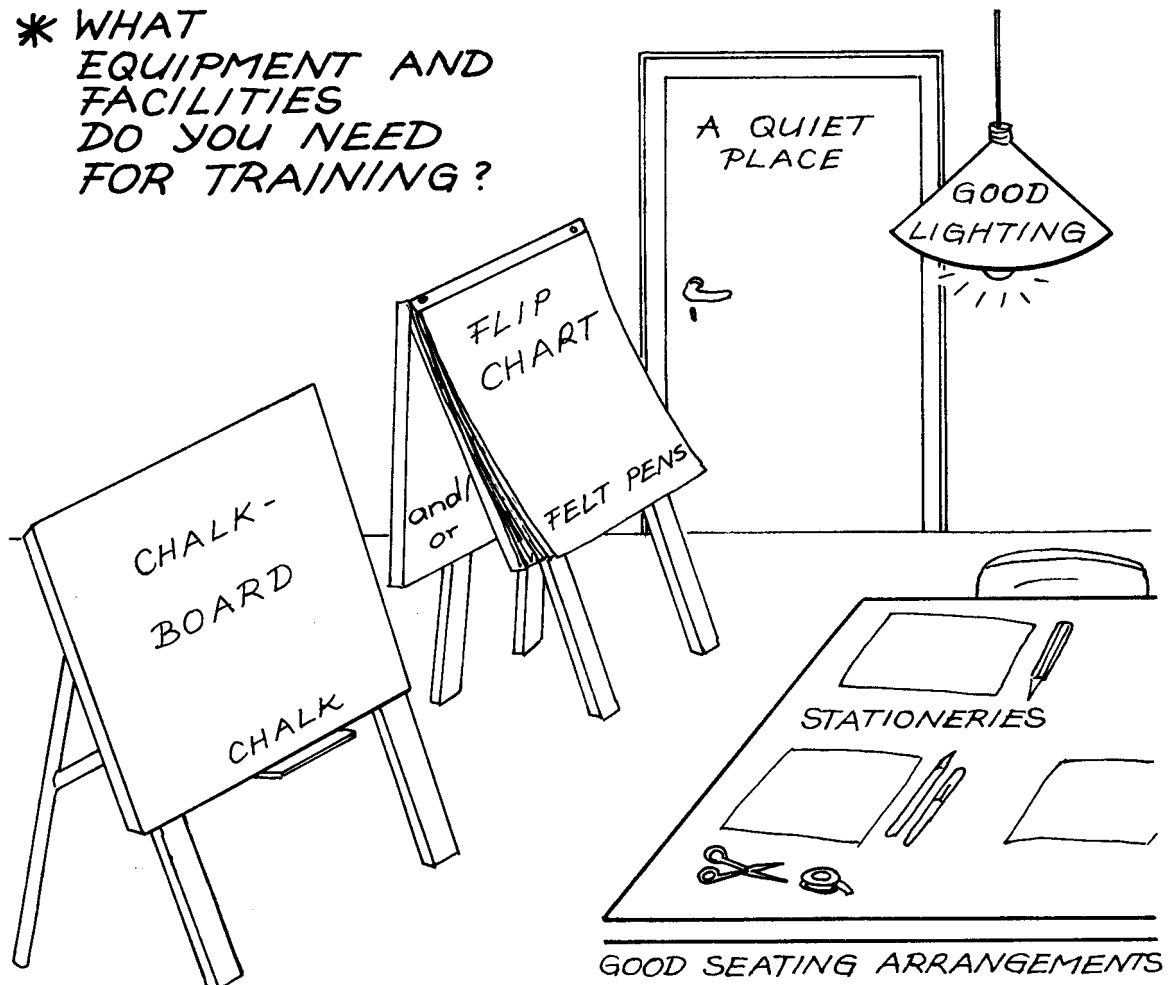
You must also be certain that you have the necessary supportive facilities (chalkboard, a flip chart, perhaps an overhead projector, adequate seating arrangements, etc.).

It may also be necessary to see if adequate lighting arrangements will be available, particularly if training is to

be conducted in the evenings. A further consideration to keep in mind is what arrangements exist for overnight stay, should it become necessary. (It is preferable for trainees to commute daily from their work places.)

Finally, there is the question as to who should meet the costs of trainees' travel, boarding and lodging, training material, and so on. If you have a common budget for that purpose, inform the co-operatives accordingly. But if you expect the trainees or their co-operatives to meet these expenses, you must clearly explain this, indicating the amount and method of payment and when it is due.

*** WHAT EQUIPMENT AND FACILITIES DO YOU NEED FOR TRAINING?**



*FORMS and BOOKS actually used in the co-operatives.
STUDY MATERIAL;
handouts, exercise material, study texts, etc.*

DESIGN OF TRAINING PROGRAMMES

Let us assume that you have made a thorough "training needs assessment" in close collaboration with your trainees. Together you have agreed on a number of topics which you will include in the training programme.

PRIORITIES

Your next step in designing the training programme is to decide on the sequence of topics - what should be taken up first and what later.

As a general rule, you should first take up the topics most likely to help solve immediate problems facing the co-operatives or those expected to help improve performance in current operations. Other less urgent topics may be taken up later.

Since priority varies with the concerns of the co-operatives, topics will vary from one co-operative to another.

TRAINING MATERIAL - MATCOM ELEMENTS

MATCOM is producing a series of self-study booklets (called "Learning Elements") on each of the major areas of concern to committee members and staff of primary agricultural co-operatives. These can be of significant use in your education and training activities.

You should go through them carefully, familiarize yourself with their contents, and decide how to utilize them best. Remember, each booklet covers only a single aspect of the management of an agricultural co-operative. To be able to decide on their suitability for your activities, you must read all of them.

For a list of the MATCOM Elements, see page 42.



ADAPTATION OF MATCOM ELEMENTS

Each Element is produced by MATCOM in a "universal" edition without reference to any particular country or set of circumstances. The material is readily adaptable to local conditions and practices. Many countries have modified it to increase the effectiveness of the training. The adaptation is most conveniently done centrally for an entire country by a special committee or team of specialists. The booklets are then translated as necessary, reproduced and distributed to trainees via the field trainers.

If you yourself participate in adaptation of MATCOM material, keep in mind the following points:

- Alter all currencies, names, crops, co-operative nomenclature, terminology and physical conditions described in the booklets to suit your specific local conditions.
- Modify the size of co-operative operations discussed in each booklet to bring them in line with those of the average co-operative in your area.

- Make sure that co-operative activities and practices discussed in each booklet meet local requirements; delete or modify whatever is not applicable.
- Be sure that staffing patterns and salaries, rules of depreciation and taxes, costs and prices of articles, rates of interest, etc. are similar to local conditions and practices.
- Translation should be done by professionals thoroughly familiar with both local language and local co-operative practices. The booklets need not be literally translated, i.e. word for word. Rather, the emphasis should be on conveying the essence of the contents through local phrases, local situations and local vocabulary. The local reader should find himself completely at home with the contents and language of the translated booklets.

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Adaptation: K.K.Taimni and B.S.Doshi, Poona

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The adapted edition should have information about the publisher, etc., as in the example above.

WAYS OF USING MATCOM ELEMENTS

Ideally each trainee should be given a personal copy of every MATCOM Element for independent study and later reference. This will ensure effective learning and lasting course impact.

There are several ways of using the Elements in a field training programme:

Example 1: Self-study

Example 2: Study **circle**

Example 3: Seminar

Example-1_--Self-study

This method is suitable for highly motivated trainees with a strong desire to learn and (usually) previous study experience. It is also recommended as a supplement to **on-the-job** training organised by an experienced manager. Procedure:

- On basis of your training needs assessment, you decide which staff or committee members in your district might benefit from studying relevant MATCOM Elements. Distribute the booklets accordingly.
- Establish an individual study plan with each trainee - what Elements should be completed within what time frame, etc.
- The trainee then studies the Elements on his own, according to that plan.
- Contact the trainee regularly to check on his progress, discuss the reading and encourage further study.

Example 2: Study-circle

Here the studies are arranged for several trainees with similar training needs who live in an area where they can conveniently commute to a central location for regular meetings of their "study circle".

- The trainees prepare themselves by studying an Element at home. They write answers to all questions in the booklet and note any difficult parts on which they require further explanation.
- On a fixed day, they meet their fellow trainees for a group session. Under the guidance of a circle leader (you, or some other suitable person), they go through the Element, comparing notes and answers. Any problems are thoroughly discussed. "Exercises" are arranged to reinforce the learning, as needed. The "class" should take approximately two hours. Before it is dismissed, every member is given a new Element to study for the next meeting.
- The study circle meetings that follow (scheduled one to three weeks apart) are arranged similarly. When the programme is completed after a few months, the trainees will have studied several important topics.
- You should follow up study results continually, encouraging the trainees to put into application what they have learned.

**"SELF-STUDIES"
AT HOME MAY
BE DIFFICULT...**

**IF SO, MORE TIME
IS NEEDED FOR THE
GROUP MEETINGS.**



Example 3: Seminar

When trainees live far apart and cannot meet regularly, this method is most suitable.

- Selected trainees are given one or more MATCOM Elements for home study. They are asked to have this completed by a certain date, when they will attend a short seminar to discuss the material.
- The seminar is held over one or more days, depending on the number of topics included. Its programme aims at helping the trainees fully assimilate the Element contents. To this end, there are discussions, explanations and exercises, as needed.
- It is suitable to conclude the seminar with "action commitments" (see page 38).

As an alternative to the above example, a seminar may be organised without prior home study required. In this case, of course, more time is needed for the actual seminar.

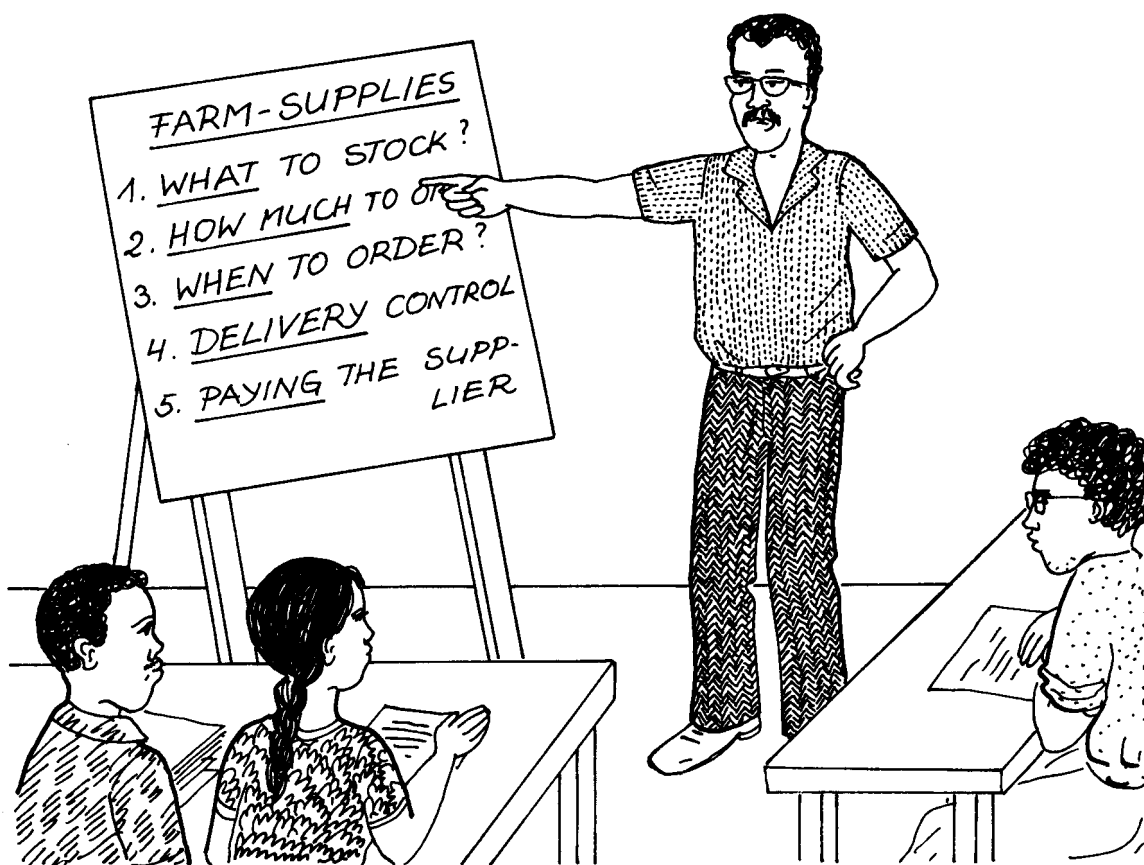
Weekend Seminar "PLANNING THE CROP COLLECTION"		
Time	1st Day	2nd Day
8.30 to 12.00	Review of study material. Last year's experiences - an analysis	Preparing the Buying Points: - Equipment - Staffing
13.30 to 17.00	Reception procedures: - Quality control - Payment procedures - New forms	Preparing and presenting plans. Action commitments.

An example: A seminar programme based on the two MATCOM Elements "Planning" and "Crop Collection".

TRAINING SESSIONS

When you run a training programme, you meet your students in "training sessions", which may be rather short, informal, local group meetings or more formal seminars with many participants. If you want your participants to profit from these sessions, remember the following points:

- plan the whole session very carefully; try to predict approximately how many minutes each section of the session is likely to take.
- Be sure that the session is clearly structured in the trainees' minds. Outline the structure at the beginning, follow it or say that you are diverging from it, and summarize what has happened at the end.



- Keep in mind the various learning points. Do not forget the job-oriented objectives of the session. Sum up the main points on the chalkboard, a flipchart or a poster. Encourage the trainees to take notes.

- Avoid, when possible, telling the trainees everything; try to elicit ("draw out") important points from them by skilful questioning.
- Avoid talking too much yourself; trainees' discussion should take up most of the time. Ask, listen and guide rather than talk.
- Never ridicule a trainee's answer or suggestion; it may have some merit and the attempt itself is commendable.
- Call on the silent and, if necessary, silence those who talk too much.
- Be sure that everybody understands what is going on; do not allow discussion to be taken over by a few who understand.

The role of the trainer

The trainees should regard you, the trainer, as the person whose job it is to organise and facilitate their learning. Your role does involve some supervisory functions, but it is important that you avoid an attitude of superiority, especially in the case of adult learners. Instead, you should try to create an atmosphere of collaboration between yourself and the trainees. Trainer and trainees alike must bear in mind the ultimate purpose of the programme: to help trainees achieve a better job performance.

Review

If the trainees have studied an Element in advance, the main purpose of the training session will be to review all of its essential points. The session might take the shape of a chapter-by-chapter discussion of the booklet. Sometimes individual trainees might be asked to provide details of certain special matters or to explain how they apply to a given job. This gives you an opportunity to provide "feedback" to

participants on their preparatory studies and to discover what areas in the Element require further elaboration.

It is important that the trainees, not the instructor, be the most active participants in the review session. The role of the instructor here is to plan the session, to elicit the key points from the participants and to lead the discussions; but it is the role of the trainees to give accounts of the subject matter, to ask and answer questions, to share their own experience, and to participate fully in the discussions. The instructor is to function as the coordinator and, when needed, as a resource person.

Feedback

Feedback - the providing of information on their progress to the trainees - is very important in the learning process. Through your comments, whether verbal or written, you should let the trainees know exactly where they stand in their comprehension of the course material. You have various ways of giving feedback.

Where there are small groups of trainees, you will have enough time to closely follow the work of each individual, giving direct personal feedback in the form of comments on answers or discussions. This greatly reinforces learning.

During their preparatory study, the trainees were supposed to write answers to the questions in the Element. These answers must now be checked.

Some questions require an exact answer and are simply marked right or wrong accordingly; others require comment or opinion, longer written responses. These can be especially useful as indicators of the full extent of trainee understanding.

You should write comments on the answers or request re-reading as necessary.

Exercises

In addition to the "review" of the contents of an Element, some additional exercises may be needed. These are intended to help trainees see the relevance of the study topic to their own work situations. They allow the trainees to practice certain work procedures described in the Element, forming an essential "bridge" between study and work.

Most Elements contain proposals for such "complementary exercises". You should feel free to modify or to add to the exercises to create the most relevant and effective training programme possible.

You should consider the suggestions of the trainees in selecting the most relevant exercises.

Upon completion of each group exercise, it is important that the trainees be given adequate time to report their findings to the other groups or to demonstrate the results of a practical assignment.



The exercises included on the training programme should be closely related to the actual jobs and problems of the trainees.

"Action-programme"

It has been observed on occasion that co-operative personnel spend a long time attending training courses - with no visible change in job performance upon their return to work and no improvement in their co-operatives.

We said earlier that there must be a bridge between training and work. Programme content must be closely related to the actual tasks of the trainees, but this may not be enough.

A commitment by each trainee at the end of his course of study to a specific "action programme" can provide that vital bridge.

Individual action programmes are developed in the manner below.

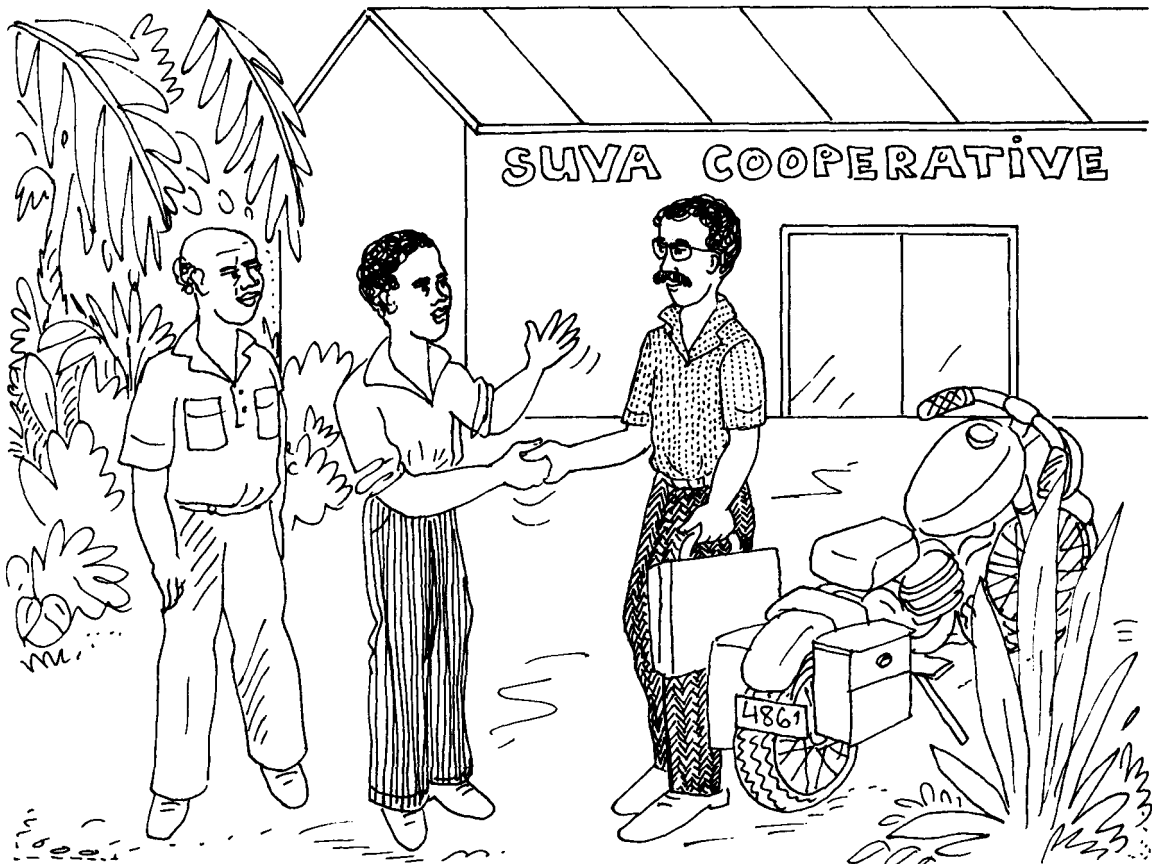
- Notify every trainee as the course begins that he will have to decide how to make use of it in his actual work. He will need to pick a particular problem and solve it, using techniques learned during his training.
- At the end of the course, ask each trainee to write up his action programme - defining the problem, his proposed solution and its time frame.
- Allow adequate time for the trainees to discuss their programmes with each other and with you. This consultation may lead to modification and improvement.
- Ask every trainee to present his plan to the full group of his fellow trainees. Encourage their comment and advice. It should be evident that the trainee is clear about the steps involved in the effective implementation of his plan and that he is fully committed to it.
- Obtain from each trainee a written copy of his action programme, including details and timing.

Follow up and evaluation

Keep the copies of your trainees' action plans for your follow-up. This is important, for several reasons.

- Your interest and support will encourage the trainees to carry out their plans effectively.
- They may need your assistance in the implementation of their plans, and they may have other ideas to discuss with you.
- You can evaluate your training courses by studying the progress of your trainees. If they fail, the fault might lie with your programme. You must determine the reasons for failure and take action accordingly.

Regular visits to your trainees are a must. Only by keeping in close contact with the societies and their staff and leaders is it possible for you to design and implement effective training programmes.



Reference Section

LIST OF TASKS

What are the jobs to be done? Who is going to do them? These questions are, the basis for both the recruitment and the manning of posts in a co-operative and **for the** assessment of training needs.

A Job description should be provided for everyone working in the society, outlining his general responsibilities.

But for practical purposes and for training, it is necessary to go a step further and establish job specifications listing every aspect of the work to be done.

The list of "Tasks in a Co-operative" which follows is intended to help you prepare detailed job specifications.

When, with committee members and staff, you begin preparation of job specifications for a co-operative, remember the following points:

- The list can be used only as a guideline; activities described vary from one society to another. You must delete irrelevant items, modify the wording of others and add new tasks, as needed.
- The list itself does not constitute a job description for the manager, but rather, in a sense, one for the entire co-operative. Certain jobs are for the committee members, others for the manager and his staff. Through discussion with everyone involved, it should be determined precisely who will do what; job specifications should be written accordingly.

Tasks in a co-operative

The tasks have been listed under the following main headings:

1. Plans and programmes
2. Financial management
3. Bookkeeping and accounting
4. Office management
5. Meetings
6. Staff management
7. Member education and information
8. Savings and credit management
9. Supply services
10. Collecting and receiving produce
11. Storage
12. Marketing
13. Transport
14. Risk management

1. PLANS AND PROGRAMMES

1.1 Determination of objectives and policies

- 1.1.1 Formulate long- and short-term objectives for the co-operative.
- 1.1.2 Decide on general policies in the society's various fields of operation.

1.2 Planning co-operative activities

- 1.2.1 Plan the society's normal trading operations and prepare staff and facilities for these operations.
- 1.2.2 Prepare plans for projects outside the routine operations of the society and assess their feasibility.

- 1.2.3 Decide on the implementation of new projects.

2. FINANCIAL MANAGEMENT

2.1 Management of working capital

- 2.1.1 Determine the need for working capital.
- 2.1.2 Identify internal and external sources of funds.
- 2.1.3 Prepare annual budgets.
- 2.1.4 Approve the budgets.
- 2.1.5 Follow up on results; compare budgeted and actual results monthly.
- 2.1.6 Take remedial action and revise budgets as necessary.

2.2 Management of cash

- 2.2.1 Estimate the need for cash and prepare cash budgets.
- 2.2.2 Follow up on cash budget continually, taking remedial action when necessary.

2.3 Management of fixed assets

- 2.3.1 Estimate the total requirement for different sorts of fixed capital according to the volume and structure of business.
- 2.3.2 Acquire the fixed assets needed.
- 2.3.3 Utilize the fixed assets for the maximum benefit of the society.
- 2.3.4 Maintain and repair fixed assets as needed.
- 2.3.5 Plan and implement replacement of fixed assets.
- 2.3.6 Keep a register of fixed assets.

2.4 Cost control

2.4.1 Design and put into practice a system of cost accounting for selected operations and products.

2.4.2 Identify excessive costs and take any necessary action for cost reduction.

3. BOOKKEEPING AND ACCOUNTING

3.1 Preparation of accounts

3.1.1 Prepare vouchers.

3.1.2 Make ledger postings.

3.1.3 Prepare trial balances as required.

3.1.4 Prepare and reconcile accounts periodically.

3.1.5 Prepare receipt and payment accounts.

3.1.6 Prepare half-yearly and yearly final accounts: trading account/profit and loss account/balance sheet.

3.1.7 Maintain account books daily.

3.2 Auditing

3.2.1 Prepare bank reconciliation statements.

3.2.2 Make all books and accounts available to external auditors as requested.

4. OFFICE MANAGEMENT

4.1 Organisation of office work

4.1.1 Plan the work to be done, delegate specific tasks to office staff and supervise their implementation.

4.1.2 Obtain suitable office equipment.

4.1.3 Maintain the office equipment.

4.1.4 Keep the society's books in safe custody.

4.1.5 Keep the office clean.

4.2 Record keeping

4.2.1 Prepare reports as required in by-laws and regulations.

4.2.2 Maintain required records of shares, bonds, mail, inventory, and the like.

4.3 Filing

4.3.1 Set up a suitable filing system.

4.3.2 File correspondence, reports, staff records, minutes, etc.

5. MEETINGS

5.1 Committee meeting

5.1.1 Prepare trading reports for committee members.

5.1.2 Prepare an agenda for the meeting.

5.1.3 Notify committee members as to time and place of meeting.

5.1.4 Conduct the meeting.

5.1.5 Take minutes of the meeting, and submit them to committee members and others as required.

5.1.6 Execute any decisions taken by the committee.

5.1.7 Follow up on decisions and actions taken.

5.2 General meeting

5.2.1 Decide on the date and place of the meeting.

5.2.2 Prepare the report for the annual general meeting.

5.2.3 Prepare an agenda.

- 5.2.4 Notify members as to time and place of meeting.
- 5.2.5 Prepare the meeting place.
- 5.2.6 Conduct the meeting.
- 5.2.7 Take minutes of the meeting and submit them to the registrar and others as required.
- 5.2.8 Execute any decisions taken by the general meeting.
- 5.2.9 Follow up on the decisions and actions taken.

6. STAFF MANAGEMENT

6.1 Recruitment and appointment

- 6.1.1 Decide on the categories and number of staff needed to carry out the services offered by the society.
- 6.1.2 Prepare job descriptions for each post.
- 6.1.3 Determine the wages for all posts.
- 6.1.4 Recruit, appoint and dismiss staff according to regulations.

6.2 Supervision and training

- 6.2.1 Arrange orientation programmes and on-the-job training for new staff.
- 6.2.2 Send staff members to suitable training courses.
- 6.2.3 Guide and encourage staff members in their work.
- 6.2.4 Develop a system of internal staff assessment, giving due recognition and taking corrective action as needed.
- 6.2.5 Keep staff informed about the society's performance, progress and problems.

6.3 Administration

- 6.3.1 Keep staff records regarding wages and benefits, deductions, leaves of absence, vacations, etc.
- 6.3.2 Pay wages.

7. MEMBER EDUCATION AND INFORMATION

7.1 Information on the co-operative

- 7.1.1 Plan suitable co-operative education programmes and activities for the coming year.
- 7.1.2 Prepare information material for members.
- 7.1.3 Implement the education programmes.
- 7.1.4 Keep members informed about the performance of the society.
- 7.1.5 Recruit new members for the co-operative.

7.2 Information on agricultural techniques

- 7.2.1 Notify members about new farm inputs.
- 7.2.2 Advise them on planting periods, techniques and soil preparation.
- 7.2.3 Advise them on irrigation.
- 7.2.4 Advise them on fertilizer.
- 7.2.5 Advise them on handling and use of pesticides and insecticides.
- 7.2.6 Advise them on harvesting.
- 7.2.7 Advise them on storage and protection of produce.
- 7.2.8 Co-ordinate programmes and collaborate with agricultural extension officers.

8. SAVINGS AND CREDIT MANAGEMENT

8.1 Shares/savings

8.1.1 Receive share amounts and issue share certificates.

8.1.2 Receive savings.

8.2 Loans

8.2.1 Collect loan applications from members.

8.2.2 Assess loan applications.

8.2.3 Approve or reject loan applications.

8.2.4 Inform members about approved or rejected loans.

8.2.5 Receive mortgage payments from members.

8.2.6 Fill out necessary documents.

8.2.7 Provide loans in cash or in goods.

8.3 Member register

8.3.1 Maintain the members' register: shares/savings/loans.

9. SUPPLY SERVICES

9.1 Purchase of farm supplies

9.1.1 Determine the best possible selection of farm inputs to be stocked by the society.

9.1.2 Select suitable suppliers.

9.1.3 Design and put into practice a suitable system for ordering economic quantities, receiving and inspecting goods and paying the supplier for them.

9.1.4 Set up adequate storage facilities for farm supplies.

9.1.5 Establish appropriate systems for stock control and counting.

9.2 Sale of farm supplies

9.2.1 Plan and implement a sales promotion programme to encourage members to buy farm supplies.

9.2.2 Decide how to issue stock on cash or credit procedures.

9.2.3 Organise a credit sales system if necessary.

9.2.4 Sell farm inputs (cash or credit).

10. COLLECTING AND RECEIVING PRODUCE

10.1 Planning for payment of produce

10.1.1 Estimate costs of handling and transporting the produce, probable shrinkage and leakage, storage and other overhead costs.

10.1.2 Estimate the selling price.

10.1.3 Decide on the price to be paid to members upon delivery of produce.

10.1.4 Ensure that cash is available when produce is delivered, keeping it safely.

10.2 Preparing for collection of produce

10.2.1 Review yearly the location of collection points, modifying the system if necessary.

10.2.2 Plan and implement a suitable system for provision of containers (bags) for the produce.

10.2.3 Prepare the facilities at the collection centres.

- 10.2.4 Plan transport arrangements and ensure that the requisite vehicles are ready for a period of heavy use.
- 10.2.5 Make certain that sufficient vouchers or other essential forms are available.
- 10.2.6 Prepare the staff for the work of collecting, hiring and training extra personnel as needed.

10.3 Receiving the produce

- 10.3.1 Check the quality and grade the produce accordingly.
- 10.3.2 Weigh the produce.
- 10.3.3 Record the relevant details systematically.

10.4 Paying for the produce

- 10.4.1 Calculate the amount due.
- 10.4.2 Pay for the produce, or accept it as recovery of a loan.
- 10.4.3 Record all payments and loan repayments.

11. STORAGE

11.1 Estimating, the need for storage

- 11.1.1 Select the most suitable type of storage.
- 11.1.2 Determine the most economical quantity to be stored and assess the total storage space required.
- 11.1.3 Ensure that the needed storage capacity is available.

11.2 Preparing the storehouse

- 11.2.1 Clean the storehouse.

11.2.2 Arrange for proper temperature and ventilation.

11.2.3 Protect against insects and rodents.

11.3 Maintaining stock control

11.3.1 Provide adequate safe storage for the produce, inspecting regularly.

11.3.2 Keep a running record of the stock.

11.3.3 Record temperature and moisture content regularly.

11.3.4 Improve ventilation and insect and rodent protection when necessary.

12. MARKETING

12.1 Identifying marketing possibilities

12.1.1 Explore all possibilities, identifying potential buyers.

12.1.2 Decide on a marketing strategy, selecting the most suitable buyer(s) and time for selling.

12.2 Negotiating

12.2.1 Prepare an offer, including price, delivery times, transport conditions and payment conditions.

12.2.2 Present the offer to the buyer, negotiate and reach an agreement, set up a contract accordingly.

12.3 Delivering and collecting payment

12.3.1 Deliver as promised.

12.3.2 Send invoice and ensure payment is received as agreed.

13. TRANSPORT

13.1 Selecting a system for transport

- 13.1.1 Calculate the costs of owning and operating various means of transport, and compare them with the costs of hired transport.
- 13.1.2 Determine the form of transport most suitable for the society.

13.2 Purchasing, owning and replacing vehicles

- 13.2.1 Obtain the requisite information for purchase of a new vehicle.
- 13.2.2 Compare the costs of different forms of financing the purchase.
- 13.2.3 Calculate the **costs** and compare the merits of various vehicles, choosing the most suitable model.
- 13.2.4 Comply with regulations concerning licenses, insurance and testing of vehicles.
- 13.2.5 Calculate the proper time for replacement of vehicles.

13.3 Allocating, scheduling and controlling transport

- 13.3.1 Design and put into practise an effective system for allocating and **controlling** transport services.
- 13.3.2 Prepare daily and weekly **transport** schedules.

13.4 Maintaining vehicles

- 13.4.1 Decide and establish the necessary vehicle maintenance facilities for the society.

- 13.4.2 Organise and implement a programme for regular inspection and servicing of vehicles.

14. RISK MANAGEMENT

14.1 Reducing risks for the society

- 14.1.1 Identify risks for the society, taking action to avoid or reduce them.
- 14.1.2 Make appropriate insurance arrangements for the society.
- 14.1.3 Make claims and obtain settlement when appropriate.

14.2 Advising members on risk reduction

- 14.2.1 Identify risks against which members can obtain insurance.
- 14.2.2 Assist members in obtaining insurance and making claims.

MATCOM TRAINING MATERIAL

MATCOM Learning Elements (booklets) published by the end of 1985 for the personnel of agricultural co-operatives include:

	ISBN:
Basic Economics of an Agricultural Co-operative	92-2-103699-5
The Budget	92-2-103698-7
Supply Services	92-2-105021-1
Crop Collection	92-2-105161-7
Planning	92-2-105215-X

In production are booklets on Transport, Storage and Marketing.

For the personnel of co-operative retail shops, MATCOM has published a series of 24 Learning Elements.

In the area of management training, MATCOM has designed complete courses of one to three weeks duration. Course outlines and all requisite material are presented in the following Trainer's Manuals available from ILO:

	ISBN:
Collecting and receiving agric. produce	92-2-103164-0
Transport management	92-2-103855-6
Storage management	92-2-103165-9
Marketing of agricultural produce	92-2-102983-2
Supply management	92-2-102365-6
Rural savings and credit schemes	92-2-103371-6
Staff management	92-2-102939-5
Work planning	92-2-103479-8
Financial management	92-2-103478-X
Cost accounting and control	92-2-105080-7
Risk management	92-2-103956-0
Project preparation and appraisal	92-2-102446-6
Export marketing	92-2-103681-2
Management of larger agric. co-operatives	92-2-102631-0

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