Emerging Concentration In Africa

The Coady International Institute continues to expand its linkages with partner organizations in Africa, particularly in Senegal, Ethiopia, and Egypt. In addition, the Institute is discussing the possibility of increased cooperation with organizations in Zimbabwe and Ghana.

This expansion is in response to the needs expressed by indigenous agencies, cooperatives, and Churches for increased skill training in development planning at the grass roots level. It is through the personal contact developed with Coady program participants that the need for increased African involvement became most evident. Such an intensified focus is also consistent with the recent, if belated, recognition by the world community of the very diverse and urgent development needs of the continent.

The Coady Institute has, over the years developed linkages with organizations in a number of countries in Africa. In Tanzania the Institute has assisted with workshops and training programs at the Moshi Cooperative Training Centre. Our work continues in Uganda with the Uganda Cooperative Savings and Credit Union Ltd. and in South Africa we maintain our linkage with the Wilgespruit Fellowship Centre and the Institutional Leadership Development Education Project (ILDEP).

In Senegal the CII is working with the Conseil National Pour la Promotion des Caisses Populaires (CONACAP) in its efforts to promote the organization of women’s community savings and credit structures. These savings groups or credit unions arose because of a very successful project in which women established and managed over 120 village based grinding mills. The turnover and savings from these mills exceeded expectations and members of the milling cooperatives felt the need to invest in community based income generating projects and saw credit unions or savings groups as a vehicle for doing this. To date the Coady has been involved in one training workshop and is planning to assist with another which will evaluate the savings groups now established on a pilot basis, before proceeding to expansion throughout the country.

In Egypt the CII has responded to requests from both the Bishopric of Public Ecumenical and Social Services (BPESS) of the Coptic Orthodox Church, and the Coptic Evangelical... (continued on p. 3)
Two New Staff Members At The Coady

The Coady Institute is gaining two new staff members, Dr. Wilf Bean and Ms. Olga Gladkikh both of whom are highly experienced in their respective areas of community education and communications.

Dr. Wilf Bean, new Coady staff member, will teach adult education.

Dr. Wilf Bean, who recently completed his Ph.D. at the Ontario Institute for Studies in Education, has worked in the two northern Canadian territories of the Dene and Inuit peoples for over 10 years. From 1974-1977 he was a community development trainer with the Dene Nation where, as a member of a team, he participated in the process which led to the Dene land claim presentation to the Mackenzie Valley Pipeline Enquiry - a landmark in the struggle for self-reliance among Canada's original people. Earlier, from 1967 to 1973 Dr. Bean held various positions as a community development officer in remote northern communities.

Dr. Bean's experience in the North has given him an invaluable insight into the day-to-day problems faced by people struggling to build a self-reliant and locally based economy. His major interest is in the link between individual development and the larger context of collective, social change. From his experience he has learned to be very sensitive to both the cultural and political dimensions of development.

Dr. Bean holds bachelor's degrees from the University of Waterloo and the University of Guelph. He obtained his masters degree in Adult Education from St. Francis Xavier University in 1978.

The Coady Institute is looking forward to working with Wilf, and benefiting from the skills and knowledge he can share with the course participants in the Diploma and other programs. Initially he will be teaching adult education and will begin his work with the Coady as a full-time staff member on May 1st this year.

We Hear From . . .

Peter Gyarko (85) of Ghana has been very busy assisting in the reorganization of the Central Credit Union League. He has also been active in undertaking a number of training seminars at the local level.

Makumbi (76) has been appointed General Secretary of the Uganda Cooperative Savings and Credit Union. Linde Besson (79) in a recent newsletter from Eastern Credit Union in Trinidad informs us that the society continues to thrive and prosper. The cornerstone for a new head office complex was recently laid by the Prime Minister and will include, in addition to the offices of the Credit Union, a daycare center, nursery school, auditorium, gymnasium and — a swimming pool! Silver Bakora, (69) has retired from public service and returned to rural Uganda to serve with the credit union movement, in particular the Buzerimba Savings and Credit Society. Alex Chanda (75) writes from Zambia that he is now vice-rector of Mpirma Major Seminary and teaches anthropology and African traditional ethnic religions. Sun-Yo Kim (80) and Dong-Young Lee (79) write from the Seoul Women's University that Kim is completing a Ph.D thesis on Education and National Development in Korea. Lee is continuing as Director of the University planning board. From Guatemala we received word that Sr. Denise Brabant (70) is concerned about the continuing critical situation in Guatemala. Prayers for peace in that country and all of Central America is her request.

George Joseph (85) in India has a new addition to his family - a baby girl. Fr. Joe Lobo (79) in Birur India writes that Christa Sharan has started a dairy program for nomadic women, and is planning an integrated irrigation project.

Geraldine Nwosu (86) returned safely to Nigeria only to find that one of her children was in the hospital. The child is O.K. now. In Australia Ken and Judith Knowland (80) are continuing their work with aboriginal people after a much deserved break of 3½ months. Ken is also teaching part-time in community development at Nungalinia College in Darwin. Greg and Peachy Forbes (80) are moving to the Philippines for at least 6 months, possibly for much longer. Greg will monitor the Negros Rehabilitation Development Fund in Bacolod City and Peachy will be working for the Canadian embassy in a field support role. Sr. Rose Ann Schlitt (86) is in Boston for awhile but indicates she will be going back to Central America in the near future. She expresses her deep appreciation for the time at Coady, and the friends she made among such a culturally diverse group of people. A. Asirvatham (84) is still with RUHSA in India.
Emerging Concentration in Africa

Organization for Social Services (COEISS). One workshop was held with each organization in 1985, and two further workshops are planned for 1987. Students from both organizations have participated in the Diploma Program of the Institute and the short courses on planning and evaluation. One special study program for Bishop Serapion of BRESS was also organized. Both organizations are working to move from a primarily service orientation to one which includes an increased focus on development.

Ethiopia has undergone tremendous change since the downfall of Haile Salassie and the proclamation of “Ethiopian Socialism” in 1974-75. Recently drought and famine, combined with the continuing war in Eritrea and Tigre have resulted in massive human suffering. The Ethiopian Evangelical Church Mekane Yesus has been faced with the task of caring for a large number of individuals and families who have been forced to resettle and establish viable new communities. The work is extremely difficult and requires integrated planning and evaluation. The Coady has been asked to assist them in training for the needed planning and evaluation skills.

In each of these initiatives the policy of the Institute is to maintain a commitment of at least three years, a commitment which includes the training of participants in the Diploma and other Antigonish based programs, and followup with the agency through training of field workers in-country. In some instances this commitment extends beyond three years, but the basic philosophy remains, namely, that the role of the Coady is to assist with appropriate training which will increase the self-reliance and autonomy of the agency and thereby obviate any tendency for long term dependence on the Coady.

In 1986-87 the Coady Institute had planned to have a consultation on innovative approaches to cooperatives in Africa. After some discussion and correspondence it was decided to forego the consultation and concentrate instead on consultations or workshops in particular countries where innovations are occurring or where new ideas and actions are developing. One example of this is in Ghana, where “Nnoba Cooperative Development Communities” are being proposed. These use as a base of cooperative development the pooling of labour in agriculture within the village context, and from this pooling go on to develop other cooperative actions in housing, light industry and infrastructural development. The keys to development of this type of cooperative are the use of local labour, skills and resources, and adaptation of existing village social institutions rather than adopting formal cooperative structures from other countries or contexts.

Similarly in Zimbabwe very exciting innovations in cooperative and collective action have been underway for some time, changes which recognize the fundamental role that cooperative labour, especially the labour of women, must play in genuine change at the village level. In both Ghana and Zimbabwe initial discussions are taking place with agencies in those countries to see if and how the Coady Institute can contribute and support these local efforts.

Co-ops In Taiwan

TICT, as it is popularly known, was set up on August 1, 1984, by a contract signed by the Taiwan Province Cooperative Administration (TPCA), Feng Chia University (FCU), and Populorum Progressio Institute (PPI), in Taichung, Taiwan.

TICT’s main objective is the integration of the work of the various institutions and organizations engaged in cooperative promotion in order to strengthen co-operative education in Taiwan, R.O.C.

The TICT organizational structure is as follows:

**EXECUTIVE COMMITTEE**
- EXECUTIVE SECRETARY
- STUDY MATERIALS SECTION
- GENERAL AFFAIRS SECTION

The composition of the Executive Committee is as follows: president — the administrator of TPCA; two vice-presidents, namely the dean of FCU — College of Business Studies — and the director of PPI; executive secretary; manager, Study Materials Section, manager, Program Section; and manager, General Affairs Section.

TICT makes use of the offices and classroom facilities of Populorum Progressio Institute for its administration and programs.

Since its foundation in August 1984, the TICT has offered the following courses:

- Basics course — three days, offered 12 times to 489 participants chosen from staff members of co-operatives.
- Advanced course — seven days, offered five times to 184 participants selected from employees of government and university students majoring in cooperative economics and seniors from agricultural colleges.

During 1984/1985, TICT has offered 21 courses which were attended by a total of 789 participants.

In January 1986, Dr. Charles Enriquez was in Taiwan where he spent 10 days on consultancy work for TICT. His Consultancy Report was published in April. In his report, Dr. Enriquez pointed out that the existing study courses at TICT are well-established and solidly supported by all concerned. He recommended that they should be retained in their present format in respect of learning objectives, target participants, duration and training methods. He suggested, however, that a restructuring of subjects be made for each type of course to reflect more closely the professional and practical needs of the participants.

Copies of the TICT Consultancy Report are available upon request as long as stocks last.

— C. Enriquez
Staff Members

Ms. Olga Gladkikh to manage Coady publications and teach communications.

Ms. Olga Gladkikh who begins working in April this year is a welcome addition to the Coady staff. She will be responsible for all of the Coady publications and public relations. She brings to the task considerable experience as a free-lance journalist for the CBC (Canadian Broadcasting Corp.) where she has worked on the writing and production of current affairs broadcasts for the network.

She also has experience in government as a public affairs officer for the Canada Employment and Immigration Commission. While there she was responsible for many of the departmental publications in Nova Scotia.

Olga is an excellent writer and has special skills in graphic design, copy editing, photography, and in the production of audio-visual presentations and learning packages.

Olga will be sharing these skills with course participants at the Coady, and with her experience as an assistant professor at Mount St. Vincent University she will be able to undertake a modest teaching load. In recent years, Coady students have frequently asked for workshops in a variety of communications and media skills to supplement their regular courses. With Olga on staff the Institute will now be able to respond more adequately to this need.

She has a Master of Arts degree in Journalism from the University of Western Ontario, a Bachelor’s degree, also from Western, plus additional courses in graphics technology from the Nova Scotia College of Art and Design.

Recent Publications


SOCIAL AWARENESS, LEADERSHIP AND MOTIVATION FOR PARTICIPATORY DEVELOPMENT AND TOWARDS A PARTICIPATORY APPROACH TO DEVELOPMENT — Cochin, India, 1985.

CONSULTANCY FOR COADY GRADUATES IN THE PHILIPPINES — San Juan, Metro Manila, Philippines, 1985.

MANAGEMENT FOR CONSUMER CO-OPERATIVE — Moshi, Tanzania, 1985.

CO-OPERATIVES FOR YOUNG PEOPLE IN BELIZE — Belize City, Belize, 1985.


INTEGRAL HUMAN DEVELOPMENT: CONCEPT & IMPLEMENTATION STRATEGIES FOR COMMUNITY DEVELOPMENT TRAINERS (ITSA) — Minia, Egypt, 1986.

REPORT OF A WORKSHOP ON PROGRAM EVALUATION IN RURAL DEVELOPMENT — Buga, Valle Colombia, 1986.
Planning and Evaluation

This insert in the Coady Newsletter is a considerably edited version of material presented in the Credit Union Technical Reporter (Vol. III, Issue 2, June 1986). The intent is to provide a very brief and straightforward summary of the planning process which can serve as a refresher for those who have studied planning at the Coady or elsewhere, or it can be used as an outline by individuals or groups which require a simple introduction to planning. — ed.

The key factor in good development planning is participation. The people who are affected by a situation of poverty and exploitation should be the ones who define the particular problems they face, decide on possible solutions, set objectives, and implement and evaluate what they do with the resources they have.

Successful organizations plan for the future. Whether it be small village based people's organizations, or larger organizations, planning involves taking the time to reflect, consider options and make decisions. Through careful planning, a guide to the future emerges. Coordinated effort is possible because each person in an organization can see how his or her contribution fits into the overall plan.

Instead of being a victim of circumstances, planning is one essential tool which allows people and their organizations to control their future. Through planning groups can respond to events in a positive manner, rather than aimlessly moving from one crisis to the next. Planning is a means of meeting and managing change. Systematic planning defines a group or organization's mission, identifies and turns objectives into results.

Planning can be defined as identifying objectives and obtaining desired results. It includes all those activities directed towards reaching a desired future.

The Coady philosophy of popular participation includes the conviction that people who are seeking to change their situation of poverty are the ones who know best the problems they face. They are the experts who can analyse their own problems and propose goals and objectives. They can in short, plan, as a way of reducing the risks they face daily and assuring that the objectives of the group are met. Through planning a group can determine cooperatively what actions and resources are necessary to attaining their objectives.

Planning also involves the building of leadership. In the planning process the articulation of objectives and allocation of tasks allows for individual skills and insights to be heard, and for people with those skills to use them at times when they are needed. At some points people with interpersonal skills may give the lead, while at other times those with functional or technical skills may be in a leadership position. Leadership is thus shared and the democratic character of the group is strengthened. At some point in the life of a group or organization more formal leadership is usually required. If the planning and evaluation process has been used consciously to develop leadership then there will be greater confidence and accountability in the formal leadership structures which are built.

Democratic control is not without its difficulties. When many people share control, it may take time before objectives are translated into action. In many situations the experience is that the extra time is well spent, that planning and implementing a program or project in a democratic and participatory way leads to more permanent and effective changes. Initially there may be confusion, sometimes conflict, in deciding on appropriate objectives or deciding who should do particular tasks, but when the group works through these difficulties during the planning process the democratic consensus which is achieved provides a very solid individual and collective commitment to working hard for the needed change.

In larger, more formal organizations which exist to serve a broad constituency and where there is a board with both volunteers and paid staff, planning should not be left to the board alone. Staff, volunteers, and most importantly, the members and constituency which is served should be an integral part of the planning process. It's a cliche, but it's true: "planning should be done with people, not for people".

The first step in planning involves achieving a consensus on the purpose of the organization and writing a mission statement. The mission statement serves as a guide for planning as well as a definition of what the group or organization is and why it exists. All objectives and strategies then should be consistent with the mission statement. A good mission statement will state the overall purpose of the group and how it contributes to broader social goals of justice and equity. A mission statement is usually general, short, and unique to the organization.

As an example, a mission statement for a newly formed savings society might look like this:

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“The mission of the Solidarity Savings Society is to accept deposits for savings and provide loans and financial services or advice to landless farm workers, men and women, who are members of the Society. In this way, and by using the principles of ‘one member, one vote’, paying and charging a fair interest rate on a non-profit basis, and through solidarity and self-help among members, the Society will contribute to the well being of its members and the just and equitable development of our society as a whole.”

Once the overall mission of the organization is clear and a statement is written, a member needs assessment should be carried out by the organization and its members. A need is a gap between what the current situation is and what should or could be. A needs assessment is a tool to enable the members to determine what must be done to fulfill its mission statement. It is critical to make sure that stated needs are useful and worth fulfilling.

All illustration of a needs assessment of a savings society wishing to increase its membership is given in Chart A following. This is only an example. There will usually be more than one need which should be met.

In making a needs assessment the group should look at all the factors which relate to the need. They should consider what are the underlying causes of the problems they face, i.e. why the need exists in the first place. In doing this they can look for causes at a number of inter-related levels. There may well be personal or individual factors which contribute to the need. Collective or community factors can be very important, as can the larger structural factors, especially in the economy. In most situations the cultural factors should also be looked at along with the ecological or environmental causes. It is also very important to know as much as possible about the membership and the potential population you are working with.

In asking questions, in trying to analyse a need and its causes, and in trying to understand the people and community you are working with, one of the most useful tools is what is known as “the six helpers” — which are really only six question words: WHO?, WHAT?, WHERE?, WHEN?, WHY? and HOW?. These “helpers” are simple questions which can be asked in a variety of ways, not only in assessing needs but at all stages of participatory planning and evaluation.

Once the needs assessment is complete the resources available to the organization should be determined. Are there sufficient people to do what is needed? Is leadership being used in the most effective way? Is there sufficient time to do what you think is required? Are local resources and technologies available to do the work? What social forces work against eliminating the cause of the need? These questions and others which assess the available resources are meant to help the group determine if the problem or need can be effectively addressed, i.e. to decide if it is a manageable problem.

<table>
<thead>
<tr>
<th>WHAT IS</th>
<th>WHAT SHOULD BE</th>
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<td>200 Members</td>
<td>250 Members</td>
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<tr>
<td>50 Members</td>
<td>Needed</td>
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<td>250 by December 15</td>
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Once these questions are considered, the group’s needs should be listed in order of priority, and the methods to obtain objectives can be determined.

Successful planning depends on a group being able to state clear, achievable objectives to address the priority needs. Objectives allow a group or organization to plan, evaluate and revise activities so that results match intentions. If circumstances change, flexibility in planning should allow for objectives to be revised or new objectives written.

Measurable objectives can be written by using the following formula:

Action Verb + Measurable Outcome + Deadline

For example: “Increase members from 200 families to 250 by December 15.” “Increase” is the action verb, “250” is the measurable result, and “December 15” is the deadline.

Four guidelines are used in writing objectives:

1. **Describe the outcome** of the action, not the action. This will set out the intention of the action.
2. **Describe the outcome in measurable terms.** This will indicate the dimensions of what precisely we wish to achieve. It will provide specifics of place, time and quantitative and qualitative measures.
3. **Describe each objective separately.** A working rule is “one objective one sentence”. Describe in language that is clear and precise.
Be realistic. Set out objectives that can be met. They challenge but are not overly ambitious.

When the objectives are clearly defined and understandable, the next step is to balance objectives and programs with limited resources. Each of these objectives and programs should be ranked in terms of priority. It is important to note that planning comes before the budget process, instead of trying to make the planning fit into the limits of the budget. Lack of funds should not inhibit proposing innovative programs. Each objective should be considered with its cost and benefit to the organization. After considering what resources are available, and what objectives have priority in relation to needs, the budget should be formulated.

Once this is completed, implementing objectives into action is the next critical step of the planning exercise. Implementation is that important bridge between thinking and doing. Plans will not lead automatically to results; they must be implemented in a systematic way.

Effective management is aided by an action plan which describes how objectives will be achieved. An Action plan defines responsibilities.

Provides performance standards to be met.

Monitors progress toward achieving objectives.

Improves understanding of each person's contribution to the success of the group or organization.

This can be accomplished by writing action steps, which is a systematic means of making sure that objectives meet desired results. A staff member and completion date should be assigned for each action step.

A simple yet effective means of listing objectives, action steps, and completion dates is given in Chart B.

First the objective is stated. Then the action steps are given in the first box followed by the person responsible in the second box. The third box contains the completion date. The comment box is to be filled out when the action is completed, dropped or postponed. This chart can be elaborated or changed according to particular planning and evaluation needs but any such chart should include the essential ingredients of specifying the action to be taken, who is responsible for the action, and the date for completion of the action. This allows for the most essential element in evaluating any program or project — that of constant or frequent monitoring.

Effective planning is a continuous process that recognizes and manages the inevitability of change. How well the planning process meets the challenges of change is the basis for evaluating and improving the planning system. Monitoring and evaluation are integral parts of planning, and allow the participants and members to learn from their mistakes as well as successes. When these lessons are identified, the planning process starts again, using those strategies that worked and discarding those that did not. Recommendations for improvements should be precise, making sure that successes are repeated and mistakes are avoided.

Of course, the true test of the effectiveness of a planning system can be judged by the organization's performance over a period of time. Engaging in a planning cycle and doing a summative (final) evaluation is recommended on at least an annual basis, or at the end of a specific program. Doing this allows the organization to test its' effectiveness over time and to gather information useful to future planning. In evaluating the work of a group there are some key questions which can be elaborated on according to specific circumstances. They include:

- Were all the objectives met? Why not?
- Were each of the objectives consistent with the results?
- Were the objectives and expected results understood by all of the participants?
- What were the weak points? Strong points?
- Was the planning process adaptable to change?
- Was each goal understandable, written in

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**CHART B**

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<th>OBJECTIVES</th>
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<td>ACTION STEPS</td>
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Planning is a vital process that often spells the difference between a successful program or organization and one that is not. It is a structured means of plotting out a future and managing change. It is not however, a "magic carpet", a panacea, which will automatically result in good development. It is merely a tool, a very useful tool, which ultimately depends on the strength and dedication of the people who participate in the development process. Amitav Ghosh in *The Circle of Reason* called plans "the fantasies of the practical". In order for plans and planning not to be mere fantasy, they must be grounded in the daily reality of people, the majority of women and men who are struggling to improve their lives and the lives of their families.

**Withdrawning from a project: Process and Approach**

by Fiona Thomas

The author was a development worker in Andhra Pradesh in south India from 1981-86. She was working for Vellubelle Abhivrudhi Sangham in cooperation with a British Volunteer Agency - Jinja Groups Trust - funded by Christian Aid. Fiona participated in the Coady Diploma Program in 1986-87 as a student in the Department of Adult Education at St. F.X. University.

Much of the training and literature related to community development is concerned with the establishment and expansion of development organizations, often through the catalytic initiatives of external workers. There is much less discussion, it would seem, regarding the withdrawal of external workers from an area after an extended period of involvement. This short article uses one group's experiences in a tribal development project in southern India to illustrate a possible approach to the withdrawal process.

The tribal people, or adivasis, are the aboriginal people of India, having been driven into the inaccessible, forested centre of the subcontinent by Aryan and pre-Aryan invaders thousands of years ago. Like the Harijans (Scheduled Castes), they are outside the Hindu caste system, but have not had to contend with systematic oppression and humiliation to the same degree. They have, however, been subject to exploitation by non-tribals, and protective neglect and marginalization by successive governments since early times, due largely to their location.

The forests have long been a rich source of government revenues. During the time of British rule the tribal areas were strictly controlled, with non-tribals being kept out except for purposes of collection of forest products, including timber. Post-Independence governments have strengthened this control of the forests, but have found it difficult to accommodate the lifestyle of the adivasis within the attempt to balance the maintenance of the environment against the potential of commercial forestry. Isolated as they are, the adivasis are easy prey for the exploitative practices of non-tribals, and the indifference of generally unsympathetic local government agencies.

The project described here started in early 1980 in the village of Vellubelle, situated in the north-east of the state of Andhra Pradesh. The project grew in four years to include six smaller villages, and in March 1984 underwent major expansion to cover 26 villages. The project consisted of a people's organization, the "Sangham", taking initiatives in education, health services, agricultural extension and cultural activities. The paid Sangham workers were all local people, predominantly adivasi, and were assisted by a team of British and Indian volunteers who lived...
ed in the area and had a variety of technical and administrative skills. The British volunteers left the area in May 1986, and the project continued with 72 local night school teachers, health workers, sewing teachers, and general co-ordinators, supported by two resident non-tribal Indians; a Director and an accountant.

The philosophy of development which the Sangham and the volunteer team evolved over a period of seven years included a commitment to freedom of choice, access to information, and accountable decision-making, as a basis for groups and individuals choosing their own arenas of risk. In practice, this varied from trying out new agricultural technologies, becoming a health worker, and applying to governments and banks for financial assistance, to producing a village drama criticizing the local political situation, tackling government officials about corruption, and demanding more humane architecture in government housing schemes.

As leader of the external team I was also the Director of the Vellubelle project, accountable along with the other team members to regular meetings of the elected executive body of the Sangham. During the six and a half years that the volunteers were in the area we were involved in developing the technical, administrative and organizational skills of Sangham workers and other villagers. We often met with local government officials in order to gather information about development schemes which were planned for the area, although this role was increasingly taken over by the Sangham workers and executive body as time went by. In the eleven months before leaving the Vellubelle project, our role included strengthening the organizational structure of the Sangham and helping both workers and villagers to cope with the departure of the team.

The Vellubelle project had been characterised from its early days by regular changes in staff due to the arrival and departure of foreign volunteers. However, the team which made the decision to phase out volunteers from the project consisted of relatively long serving members, who had been with the Sangham for two to five years. Because the team lived in the project area in village-style housing and were subject to many of the physical constraints of forest life faced by the adivasis, we had established a very close relationship with the villagers. This enabled us to openly discuss the impact that our departure would have on the Sangham, and on individuals.

The period of withdrawal from the project can be divided into seven stages:

Stage 1: Deciding to Leave
In June 1985, five of the seven member team decided to leave the project, for a variety of reasons. We were all due to end our existing contract periods during 1986, and tighter visa regulations for foreign residents meant that we might be asked to leave India at any time. We were faced with the task of phasing ourselves out of the project as the last foreign volunteers to serve with the Sangham.

At one of the periodic team weekends away from the project, we discussed the implications of our decision to leave with the two Indian members of the team. Together, we formulated a strategy for negotiating with the Sangham our withdrawal from the project. This was not simply a question of the Sangham losing a major part of its support team. We saw our departure as an opportunity for releasing the Sangham from its dependency on foreign funds and both foreign and Indian external workers. At that time the Sangham seemed to be entering a phase of stability, with local people taking on an increasing amount of the planning and management of new activities without intervention from the team.

Stage 2: Approaching the Sangham
Believing that it was important to introduce the idea of our departure carefully, we organized a workshop for the fifteen people with the most responsibility within the Sangham: four cluster presidents, the overall president, and the ten full time coordinators. The residential workshop was held outside the project area, and included three resource persons who had visited the project in the past for evaluation and training sessions.

Over a period of three days the workshop participants carried out an intensive review of the existing Sangham structure and activities, highlighting the weaknesses as well as the strengths of the organization. Although accepting the volunteers decision to leave, the Sangham representatives were very clear in their desire for a new Director to be appointed. They felt that already many of the training and administrative tasks previously performed by the volunteers were being taken on by themselves and
other local workers. They had doubts however, about the ability of the Sangham to continue in the sudden absence of external funds. The team and resource persons therefore agreed to locate a new Director from Andhra Pradesh who would assist the Sangham’s growth towards economic self-sufficiency.

Stage 3: Communicating the News of Departure

On their return home the team and the Sangham representatives explained the outcome of the workshop to the people of the project area, through a series of village meetings. The proposed time schedule for the departure of the volunteers and appointment of a new Director was published in a special issue of the Sangham’s quarterly newspaper.

Stage 4: Selecting a new Director

While the people of the project area were being oriented towards the changes which were to take place, the project team started the search for a new Director. They collaborated in this task with the resource persons from the workshop and the members of an advisory committee which had been established in 1983 to assist the expansion of the Vellubelle project.

After a series of interviews of candidates, which included a three day visit to the project, a new Director took up residence with the project team in early March.

Stage 5: The Transition Period

Because the period of overlap between the volunteers and the new Director was only three months it was important for him to become acquainted with the various systems of the Sangham very quickly.

The Sangham administration had become increasingly decentralised since its major expansion in 1984, and this was expressed in the autonomous control of activities exercised by each cluster of villages. Therefore the team ensured that the Director visited all the villages of the project area; participated in cluster executive meetings, first as an observer and later as an accountable member of the team; had discussions with executive members during visits to their homes; carried out training sessions with Sangham workers; and was introduced to local government officials.

In addition to organizing the orientation of the Director the team continued the process of relinquishing the roles of training and project management to local workers.

Stage 6: Consolidation and Future Planning

The fifteen participants of the original workshop met again for a four day planning workshop in early April, during which they were able to assess the progress made by the Sangham since learning of the volunteers’ decision to withdraw.

The last day of the workshop was taken up entirely with planning Sangham activities for the subsequent months, assisted by the new Director, and remaining Indian member of the old team. One of the important activities discussed at this workshop was the administration of annual cluster executive elections. These were successfully held three weeks later and were an important opportunity for villager-affirmation of the changes made in the management of the Sangham.

Stage 7: Celebration of Departure

During the years of the Vellubelle project, volunteers had sometimes returned to their home countries without sufficiently preparing the villagers for their departure. Believing that this group of volunteers would be the last to be involved in the project, the team emphasized the importance of involving the villagers in a celebration of the changes which were occurring. This was seen as a way of easing the Sangham into a new stage of its development. Many villagers expressed sadness, disappointment, and sometimes anger, in the months before the volunteers left, and the whole team tried to deal constructively with these reactions in order that the Sangham integrity could be maintained.

The departure day, planned by the Sangham executive and staff, was an expression of self confidence in their ability to carry out their expanded administrative and organizational responsibilities. The official farewell to the volunteers was combined with the annual general meeting of the Sangham, so that all the villages were represented. The volunteers were given a traditional village farewell, with speeches, garlands, and a community meal.

There are certain features of the process which has been described here which may be different from some other development projects, such as the nature of the relationship between the foreign workers and the local people, and the length of time available to prepare for the withdrawal. Moreover, the withdrawal process is not yet complete, with the project still assisted by external funding and two non-trivial staff members. However, I feel that the elements of our approach could be adapted and used in other situations where an established group initiates, in consultation with a local peoples organization, the phasing out of external workers.

"If development is to mean redistribution of power and productive assets, if it is to mean development of human beings, and if the majority of the people have to be active partners in development, then we have to change our whole approach to project formulation. Both the kind of projects we undertake and the process of formulating projects will have to be drastically different . . . If we want the local people to participate in formulating projects, then organisation of the local people will have to precede formulation of projects. We will have to start work not by formulating projects but by getting to know the people, establishing rapport with them, analysing with them their situation and problems and discussing what needs to be done and how. Our efforts should be to help the people form their own groups and organisations, and obtain the necessary knowledge and skill to initiate a process of development. Projects should be means towards people’s development and strengthening of people’s organisations and not ends in themselves."

Dr. Charles Enriquez
Retires

Dr. Charles Enriquez, Coordinator of Cooperative Studies has, after seven years at the Coady, decided to retire, effective June 1987. Dr. Enriquez first came to the Institute in 1980 and in the intervening years has worked with hundreds of students at the Coady, and with many more in workshops and consultancies overseas. Asked what he intends to do when he leaves, he indicated he would move to Vancouver on Canada's west coast where the weather is warm and where he has relatives and close friends. He hopes to do some teaching and will continue his overseas work as a consultant.

Before coming to the Coady, from 1977 - 1980, Dr. Enriquez worked and taught business and cooperative management in Vancouver. Prior to that he held various teaching and administrative positions in Malta, including nine years as an economist and Head of Agricultural Development for the Ministry of Trade, Industry and Agriculture. He also undertook consultancy work for the FAO during these years.

Staff and students at the Coady will miss Charles, and we wish him and his wife Frances the very best for the future. Certainly we plan to maintain contact with him, and know that many of his students will also wish to do so. After June 8th he can be reached at the following address:

Dr. Charles Enriquez
Apt. 7 - 1366
West 14th Avenue
Vancouver B.C., CANADA
V6H 1R1

We Hear From . . .

Tamil Nadu, India, and comments that in implementing some of the lessons learned about evaluation and planning, conflict is not only inevitable, but essential to genuine change. Rev. S.K. Osel-Bonsu (85) from the Volta Region in Ghana says he has been very busy travelling in the region organizing youth for training in farming and fishing skills. Sr. Irene Fernandes (85) in Mangalore, India, has invited all the Coady staff to visit her! In Korea Bok-Nan Yoon (82) in addition to completing her Ph.D. has undertaken a small project which will keep him in touch with the realities of rural life, where he can apply some of the practical lessons he learned at Coady. Congratulations to Zakia Meghji who attended the Coady consultation on Women in Development in 1985. She writes that she has been elected to Parliament in Tanzania, has had her book The Woman Cooperator and Development published and continues to do short term consultancies on women and cooperatives. Sr. Betty Anne Kinsella (84) is working on converting an old school in Ottawa, Canada into a community center which will include child care facilities for single mothers. Congratulations to Rev. J.B. Kalem-Imana (72) who writes that he has completed his Doctoral degree at Drew University and is now teaching at Ntungamo Seminary in Tanzania. In Zambia, John Matongo (82) says that government financial constraints have curtailed his work; nevertheless he is now trying to get support for a school uniform production scheme in his district. In Zimbabwe we have met with or heard from a number of people. Brother Fidelis Mukonori (81) is on leave from Silveira House to study for the priesthood. Bridget Mugabe (81) is now with the Ministry of Community Development and Women's Affairs in Harare. Sabina Mugabe (77) was elected member of parliament, but continues to coordinate nutrition programs at Silveira House, and is also director of a newly established training center for women. Lilian Kamanga (82) is now director of the National Training Center for Rural Women, under the Ministry of Community Development and Women's Affairs. She is also a vice-president of the Zimbabwwe Women's Bureau. Godfrey Chakabuda (77) is now with the Finance Division of the Ministry of Education. His wife, Jullie, (80) is a provincial Health Officer with the Ministry of Health. Fred Comendo (79) has just returned to Zimbabwwe following the successful completion of theological studies in the United States.

This is just a small part of the correspondence and cards we have received from Coady participants. It would be impossible to include all this material here; however, if you are interested in contacting someone who was at the Coady, but don't know their address, please feel free to write. We won't guarantee that we have their address, but we do attempt to keep an up-to-date record of graduates' locations.

The Latin American Co-operative Consultation

Bogota, Columbia
2/2/87 to 13/2/87

The Latin American consultation took place in Bogota, Colombia from the 2nd to the 13th of February. The event was held in "Los Pinares" retreat house 12 km. to the north of the city, a secluded tree surrounded house. There were 14 participants from 11 countries (Argentina, Chile, Paraguay, Uruguay, Ecuador, Colombia, Venezuela, Costa Rica, Honduras, Spain and Mexico) who had been invited on the basis of the selection of their paper. The theme chosen for the consultation was that of 'Innovative Approaches to Cooperative Development'.
The coordination of the consultation was in the hands of Dr. Kevin Le Moran of Venezuela and the overall director was Fr. Alex MacKinnon, Institute Coordinator for Latin America. Unfortunately because of the death of his brother, Fr. Alex had to return to Canada, being absent for the greater part of the event.

The first week was given over to the presentation and discussion of the papers. While there was little that was very original the papers sought to plant successful approaches to problems considered to be chronic in Latin American cooperativism: the low levels of participation of peasant and marginal group members; the excessive dependence on government paternalism; the weakness of traditional educational programs; the problems of collective agricultural production cooperatives among others.

There was considerable emphasis on rural cooperatives (eight of the presentations) oriented to helping the indigenous and small peasant farmers. The papers presented structures and techniques for organizing and educating the farmers to permit their active participation in the control over their cooperatives. One of the more interesting ideas was the organization of the members in small local groups linked federatively in the larger cooperative organization. Two papers dealt with this approach. Other papers dealt with experiences of collective cooperative farming, particularly interesting being that of Campo Herrera - a collective sugar growing cooperative in Argentina which has been able to integrate its economic and social processes effectively.

The specific topics presented were: the Caja Popular Movement in Mexico, the originality of which, in Latin America anyway, is that it has no legal sanction and functions as a self-directed, self-monitored movement; a Mexican production cooperative movement formed by small Christian communities; a community action and conscientizatration program among Ecuadorian highland Indians; a rural cooperative program in Paraguay based on small homogeneous and interlocking cooperative groups; a similar program among small-holding coffee producers in Venezuela; the adaptation of traditional share-cropping relations to former collective cooperatives in Chile; and a novel approach to credit unions in Honduras where the members received credit initially through a revolving fund and only later became organized in the cooperative. Two present actions dealt with integrated development projects; two others with educational programs for small rural groups; and one with an experience of community development in Spain.

For those familiar with the St. Francis Xavier extension program and philosophy, little of what was presented was very new but in view of the types of approach taken generally in Latin America to cooperative education, and the growth of large scale and often bureaucratic cooperative structures with little member involvement, these papers represented the resurgence of a more critical approach, reflecting concern with getting back to a more radical cooperativism.

The discussion which arose out of the presentations tended to focus on a number of basic topics: the applicability of the traditional cooperative principles to the present movement; problems of government involvement and legislation; cooperative integration; dynamic educational approaches; the role of professionals and auxiliary support organizations; the continuity of the support processes and the moral and ethical problems faced by the cooperatives.

As a result of these discussions the group agreed in the second week to focus on four basic areas: the moral and philosophical definitions of cooperativism and the role of cooperatives as an alternative economic and social system within Latin America; the macro and micro strategies which cooperatives should employ to further their role; the organizational structures needed in order to function effectively in the light of their principles and effectively within the society; and the content, methods and approaches needed in the field of cooperative education.

Underlying the whole discussion process was the belief of the participants that cooperatives have a role in development in that they must offer a viable alternative to both capitalism and state socialism and that they are key tools to the creation of an alternative economy among the marginal masses of the sub-continent. To do this they have to have a radical but realistic philosophy, clearly defined strategies, obligatory integration at a system level, and permanent critical educational processes. The conclusions of the discussions pointed out ways of achieving these points.

The second week operated as a work-shop with discussion groups and plenary sessions. The most salient fact was the high degree of agreement among the participants, despite their varied backgrounds and experiences. In addition to the discussion activities there were outside presentations given by the Latin American Confederation of Worker Cooperatives (COLACOT) on their project of a worker’s sector of the economy; the Colombian Coordination of Voluntary Work on their program of micro-enterprises; and a film on the Mondragon Production Cooperative Experiment in Spain. At the weekend visits were organised to Bogota and surrounding tourist centres. In all it was a stimulating and very cooperative experience.

Coady Advisory Committee Strengthened

The evaluation of the Coady Institute recently completed by CIDA has recommended that the advisory committee be strengthened and take a more active role in assisting the Institute and St. Francis Xavier University in the development of the Institute’s program.

Action has recently been taken to implement this, and the Institute is pleased to announce the appointment of two additional members to the committee, Mr. Bruce Thordarson and Mr. Tim Broadhead. At least one further member will be added, that person to be from a developing country.

Mr. Thordarson is presently Associate Director and Director for
Development, of the International Co-operative Alliance based in Geneva. He will bring his extensive knowledge of the cooperative movement to the committee, as well as his experience in development funding gained as director of the Co-operative Union of Canada and the Co-operative Development Foundation.

Mr. Broadhead has considerable experience as a development worker in Asia and Africa, and has been Director of Interpares, a small but very effective Canadian based NGO. More recently he has been working with the North-South Institute in a critical review of the work of all Canadian NGO's actively involved in development and development funding. With his very extensive knowledge of NGO's and the difficult, often conflictual environment in which they operate.

The basic principles of co-operation as advocated by the Rochdale Pioneers do likewise put emphasis on development he will be an important contributor to the work of the committee and to planning future Coady programs.

Present plans call for the committee to meet at least twice per year, however, depending on finances and schedules this may be increased. The intent is to have the committee provide an ongoing and critically supportive role to the Coady Institute in improving its courses and overseas workshops.

Coady Graduates and friends of the Coady should feel free to write (c/o the Coady Institute) to the advisory committee with their thoughts and suggestions for the program.

New Short Course
To Be Offered
This Year

The NGO In Transition:
Planning For Change

A new short course entitled “The NGO in Transition: Planning for Change”, will be offered this summer from July 13-31. The Course will be taught by Ricky Stuart, a member of the Coady Staff, and will concentrate on the planning problems and opportunities unique to NGO's involved in development. There will be considerable emphasis on analysing the complex social, economic, political, cultural, and governmental context in which NGO's operate, and how this affects the development of organizational mission, objectives, and administration.

The course is in response to requests and comments made by Coady graduates and partner organizations overseas, who see a need for some deeper understanding of how NGO's can plan for change and respond in authentic and participatory ways to the difficult, often conflictual environment in which they operate.

Each person attending the course will prepare a draft plan of action for change within their organization and through discussion and debate in the course arrive at a change plan which can be proposed for discussion and implementation when they return home. The Coady Institute will follow up the course with ongoing suggestions and consultation where appropriate.

This is the first time such a short course has been presented, and the response will be evaluated to determine if it will be repeated in future years.

Migros Co-op...

The Social Audit Idea

The Bogardus definition of a co-operative leaves no doubt in one's mind the dual nature of co-operative enterprise.

“A Co-operative is a free association of persons legally constituted for the purpose of conducting an economic enterprise or business which they own, control and administer democratically for the purpose of furthering their own economic and social well-being and that of their community.”

The emphasis on social reporting at the Migros came into force in 1978 with the publication of their first social report in which it was clearly shown that the social dimension of cooperation needs always to be kept in sight by co-operative directors, managers and members. In the words of Rudy Cujes, in his publication “Social Reporting — Auditing for Cooperatives”, he says:

The first purpose of introducing social reporting would be to resensitise boards, management, and membership to the social aspect of co-operative activities, to the unique