

Developing Problem Solving Leadership at the Grassroots

A Training Guide for Co-operative Trainers

Contents

Glossary of Key Words

Affected

To have an affect on; a feeling, emotion or desire especially leading to action.

Affirming

The acceptance, respect of another's uniqueness or individuality.

Aims

What is hoped that will be achieved from a given activity; a goal.

Alternatives

Available in place of something else; one or more possibilities.

Analysis

To take apart something in order to identify or study its nature or structure.

Approach(ed)

Making steps or process involved in doing or tackling something.

Assertive

The act of communicating clearly without distortion whilst respecting the other.

Awareness

Having knowledge or realization.

Attitude

A way of thinking; the stance towards something.

Attributes

A quality that is characteristic of a person or thing.

Behavioural

To act or react in some specified way.

Brainstorm

To generate spontaneously from a group as many ideas as possible in relation to a particular topic or word in a short time.

Creative

Having the power or ability to think or act showing imagination and originality as well.

Conflict

A disagreement between people with different needs.

Conscious

With one's mental faculties awake; aware something is happening.

Cooperation

Working together.

Co-operative

Voluntary association to meet cultural, social and economic needs of members who jointly own and control it.

Definition

To outline clearly; to mark out the boundary of.

Discriminatory

You treat some people better than others, and that you base your treatment of people on unfair standards (e.g. race, religion, colour, gender). Legislation or policies which are discriminatory make unfair distinctions between people based on unfair standards.

Discussion

A conversation with an element of a debate.

Drawbacks

Things that happen that do not help in the forward movement of an activity.

Empowerment

People have the confidence, knowledge and skills to take control over their own lives and circumstances.

Emotions

The feelings within a person in relation to something experienced.

Envisioning

How one visualizes or foresees certain events in one's own mind.

Evaluation

A process of measuring something or deciding whether something is good or bad. A person who does an evaluation is an evaluator.

Evaluate

To assess the value of an activity after experiencing it.

Experiential

Something which you have obtained or learned through experience. The experiential diversity of South Africa's people refers to the fact that our experience as a nation is very wide.

Facilitator

One who makes easy and assists the learning process in a given activity.

Feedback

To relate or give information about a particular activity after participating in it.

Follow up

To continue further work on something that has already begun.

Frustrating

When one is prevented from achieving what he or she intends; the feeling of wasted effort on something which is useless.

Gender issues

Problems, questions, debates about the equality between men and women.

Ice breakers

Activities that help break down barriers between people making them more relaxed and interactive.

Implementing

To put something into effect.

Intrinsic

Rooted; belonging to the basic nature of a person or thing.

Nonsexist

Not to discriminate on the basis of people's sex or gender. You treat both men and women the same.

Perspective

How one looks or views something that has taken place.

Purpose

The reason behind a given activity. Why do you do this activity or that?

Reconciliation

The act of restoring friendship between people after an estrangement or quarrel.

Responses

In this training it refers to an open positive action to a communication.

Self esteem

How one regards oneself; the opinion one has of one's self.

Skills

The ability to do something well.

Task

A piece of work to be done.

Values

These are your beliefs about what you think is important or good. They influence the way you act.

Section 1- Preparing the Ground

Introduction

In the world in which we live some people are rich while the majority are poor (workers and unemployed). The capitalist system has forced the burden of this unequal and unjust system to be carried by the poor majority. There are a range of problems caused by the capitalist system which include unemployment, poverty, depletion of the natural resource base of the world, pollution of cities, rivers, the oceans and the ozone layer. In most cases the poor are not included within the system but rather are forced to exist on the margins of it. In the extreme, but all-to-common case they are forced to live as homeless and landless families and communities.

The promise of a different and better world has not been kept by the capitalist system. Poverty has increased both within and between countries with approximately 1.3 billion people living in grinding poverty around the world. Mass discontent is increasing and becoming unbearable. The challenge now is for the poor majority to begin the process of freeing themselves from the system. In order to challenge this system, lessons from past experiments (both successes and failures) tried in the name of the poor majority must be learned and constant struggle must be waged. The struggle to break out of the system is both ambitious and necessary. There are many sides from which the system must be challenged in order to create an alternative that places the well-being of humanity at its center. For example, the dominant forces of competition, greed, selfishness, and individualism must be transformed. If these basic ways of relating in the world are not challenged then the freedom to live with dignity and in cooperation with society and nature will not be realised. This struggle for social transformation must rely fundamentally on the knowledge, confidence and potential of the poor.

Co-operatives are both an important alternative to the current system and a weapon in the struggle against the system. In other words, co-operatives provide an alternative space in which people can organise to meet their real needs. Indeed, co-operatives are part of the practice of freedom from the capitalist system. In South Africa we are fortunate to live at a time when real change is possible. Our new democracy has given the previously oppressed majority an opportunity to change their lives. Within our new democracy we have the opportunity to end suffering. One important avenue on which we can build a new society is by building a strong and powerful co-operative movement and sector.

This training guide is meant to assist in this struggle.

Purpose of the Training Guide

The main objectives of the training guide are the following:

- Provide tools for transforming society – problem-solving techniques and practices are shared with co-operators so that society can be made to work differently to

meet its needs. Such tools are meant to give more power to the poor and to enable a struggle against oppression and suffering.

- Capacitate a cadre of problem-solving leaders in the co-operative movement – while all co-operators are equal in a co-operative and all have one vote, this is not enough to ensure that a co-operative or the co-operative movement makes the right decisions. It is necessary to empower leadership in the co-operatives so that they can facilitate a correct understanding of problems faced, smart solutions and clear action.
- Empower trainers to train other co-operators - every co-operative has to have the capacity to educate its worker owners about problem solving. This guide attempts to develop training capacity among co-operators by empowering a core of dedicated trainers who would share this knowledge and tools with other co-operators. In the end every co-operator has to be a trainer and learner, and ultimately understand problem-solving leadership.

Key Principles for Co-operative Training and Trainers

Learning is a continuous process, an every day activity and an integral part of what it means to be a human being. Learning is about how we change and become different from the way we were before.

For real learning and capacitation to take place, co-operative training and trainers cannot behave like school teachers or lecturers. Co-operators cannot be empowered just by lecturing to them. The learning process is about opening and awakening critical consciousness so that fear to live as a full human being, in association with others, is overcome.

Co-operative trainers have to share the tools of problem solving by applying the following principles:

- ***It is people-centred:*** it encourages participation, values people, celebrates diversity, and puts people first. It recognizes people's skills and experiences as key resources.
- ***It is active:*** it involves people doing things, in experiencing them.
- ***It is enquiry based:*** it continually tries to uncover why something is the way it is and to explore what is going on under the surface.
- ***It is critically reflective:*** self-awareness is seen as an integral part of taking action, and it is reflection aimed at gaining insights that will inform future actions.

- ***It builds on existing knowledge:*** it draws out relevant information from the participants about their needs and context and provides processes which encourage people to critically analyse and discuss from their own experiences.
- ***It responds and adapts to people's needs:*** it is flexible enough, open enough and sensitive enough to recognize people's needs and to change to meet them.
- ***It recognizes the importance of feelings:*** human transformation is as much about what happens to how you feel as it is about how you think.
- ***It is NOT neutral:*** rather it is clear about where it is coming from, what it is trying to achieve and why, and whose interests it aims to serve.
- ***It is holistic:*** it looks at linkages between the past, present and future, between the individual, the group, society and the external environment as well as between local, regional and global levels.

Being a Trainer

In co-operative training, the trainer has a variety of roles such as animator, facilitator, skill-sharer, clown, enabler, sharer of real experience, and theorist. While there are multiple roles to play, ultimately each trainer will find his/her own style.

It is important for the trainers not to see themselves as “only” a trainer. In order to give the training a grounding and relevance, we need real problem-solving leadership experience to confront the hardships and struggles that we have experienced. Thus, the trainer must share his/her skills and experiences freely. Working closely and generously with other trainers, whether more or less experienced, builds their capacity and one's own. It allows one to grow and to form genuine teams in every situation. It also protects against the virus of self-inflation (thinking that being a trainer makes one an expert and therefore unable to learn from others).

It is important to remember that through the process of experiential learning the facilitator learns from the group he/she is working with. In other words, it is important to remember the trainer may not always have ‘all the answers’. It is through this process that active learning takes place. The trainer must capacitate people to take action, and then reflect on and evaluate the situation in order to draw the right lessons from the action taken. In this way learning becomes a never ending process.

Workshop Guidelines

This training guide uses a workshop method to ensure two-way learning. In this approach the facilitator has to put into practice the principles of training mentioned above. The

workshop-based learning approach is meant to gather co-operative members into small groups in which they are able to learn together and from each other.

This guide sets out an intensive program of workshop-based training that can happen over three days. However, this is just a guideline.

The training content is made up of modules which follow a sequence of building block learning. This means it is important to exhaust and work with the ordering of the training modules. However, this does not mean that the time spent on each module has to be as suggested. Facilitators might find it is necessary to spend several days on one module before moving on to the next one. Trainers must remember that this learning process requires patience.

The theory content of the modules should be presented by the facilitators. To reinforce the theoretical content, all learners and participants should be provided supporting material.

The actual location of the training workshop should be guided by the circumstances faced. This requires creativity and adaptability. For example, training might take place in a waste recycling plant, a community hall, on a piece of farming land, under a tree and so on. Workshop-based training is a tool that can be used in various places and settings.

Facilitation tools (e.g. chart paper and pens) compliment training, but are not fundamental to it. A facilitator or the co-operative's lack of resources to purchase the facilitation tools should not prevent the training workshop from taking place. In many of our cultures and societies learning has also happened verbally – by talking to each other and using whatever is available in the immediate environment like drawing with sticks in the sand or using words, symbols and objects to represent the people, events or ideas. We would encourage trainers to adapt the content in this guide to what is appropriate and necessary in the circumstances.

Section 2 – Sowing the Seeds of Critical Consciousness

In experiential learning many activities involve participants working in groups. Ideas and feelings are shared in relation to a particular task given; there is sharing to help get to know one another at a deeper level, to help build trust and foster a sense of community within the group.

This part of the training guide sets out a 3-day problem-solving leadership training workshop. The content is divided into the following modules.

Day 1:

- Module 1 – Introduction to Problem Solving
- Module 2 – Co-operative Leadership and Problem Solving

Day 2:

- Module 3 – Understanding a Problem
- Module 4 – Finding Answers
- Module 5 – Making Decisions

Day 3:

- Module 6 – Taking Action
- Module 7 – Outcomes
- Module 8 – Evaluation of the Workshop Training

Day 1

Module 1 – Introduction to Problem Solving

1.1 Welcome

The role of the educator is to present to the people in a challenging form, the issues they themselves have raised in a confused form – Mao Tse Tung

Ice Breaker

Empowerment exercise: *Names alphabetically.*

Go around the room and get every participant to answer the following questions:

- What is your name?
- Who gave you your name?
- Does your name have a meaning?

Then ask the group to form a single file line in the room (one behind the other) in alphabetical order. For example, Aaron would be first and Zandile would be last. After

everyone is in line, go around the group and have each person say his/her name for all to hear.

Ground rules

It is important to have ground rules so people are aware how they should conduct themselves in the workshop.

Deciding group rules exercise

Ask each participant to spend a few minutes thinking about answers to the following question on their own.

Questions to ask:

- How can other group members help you learn?
- What might make you feel uncomfortable in the workshop?
- What particular things would you like to say about how we should work together?

Participants then discuss their answers in plenary. The facilitator writes up the points and identifies the commonalities.

Statements agreed to by the whole group are written on a separate sheet of paper.

As each issue is dealt with, check with the whole group whether or not it is acceptable. If there is disagreement, encourage discussion of the statement, clarify misunderstandings and if possible clarify acceptable amendments.

Display the ground rules prominently in the room.

Discussion points:

- *Sharing with trust*
- *Punctuality*
- *Commitment*

Grouping Exercise

The facilitator breaks the group into smaller groups by consecutive numbers depending on the size.

Participants in a row count themselves by shouting out a number: One for Ben, Two for Nobantu, Three for Susan. This is then repeated.

Or alternatively if there are resources available hand each participant an object (e.g. a twig, leaf, pencil, a piece of paper). The participants have their eyes closed whilst the facilitators hand out the objects. The participants then move around the room asking others if they have the same object. When they have found the two people with the same object that they have, they form their group.

The purpose of this is that it is a fun and interactive way of putting people in groups for the next exercise, and gives participants a chance to move around the room and talk casually with one another.

1.2 Identifying Problems in the Co-operative

Participants need to be broken up into groups which they would work in throughout the training unless instructed otherwise.

These groups should not be larger than 6 people per group. Smaller groups assist with creating a conducive learning environment. Sometimes if the conditions permit an ideal group should be composed of 3-4 people.

Small Group Exercise: Identifying Co-operative Problems

In their groups participants explore what problems they are faced with in their co-operative. Each group comes up with three problems. These are then written up for all the groups to see. These problems will then be used as examples and tools for understanding the theory throughout the training.

1.3 Problem-solving Approach

In the world in which we live decisions are made everyday. Most of the time decisions are made without our permission or opinion (or even knowledge of the decision), and only rarely are we actively involved in the decision-making process. In other words, we are largely excluded from decisions that affect our lives. The power to make decisions is held by a few people (for example the boards of companies, the National Cabinet, or men who dominate families). This power to make decisions that affect other people is not “god given.”

Everybody must be able to make or influence decisions that affect their lives. The failure to influence decisions does not merely arise from the exclusion from the decision-making process. Rather a large number of people, mainly the poor, suffer from a “culture of silence.” Their poverty destroys confidence in themselves and they do not believe they can take charge of their lives and make decisions.

Problem solving is fundamentally about decision making. It is also a means through which people can overcome their suffering. Everyday we are faced with problems in our lives. Sometimes the problems are about simple things. Should we smoke cigarettes or not? Should we buy rice or bread? Should we get married or not? Other problems in our lives are more difficult to solve. For example how do we get employed? How do we feed our families? How do we stop the destruction of nature or prevent violence against women? How do we change our lives so that we can make progress?

In order to come up with viable solutions, problems must be understood properly. Failure to understand a problem will certainly lead to the wrong solution and ultimately inappropriate action. If a government does not understand the population's need for housing near their workplaces, the government might provide an inappropriate solution to the problem of housing. For example, they might make the mistake of providing housing far from places of work (a solution to homelessness), but this would not be appropriate for solving the real problem of housing near workplaces. Thoroughly studying a problem is therefore important and essential for quality decisions and appropriate actions to be taken.

In a co-operative many problems confront the members, worker owners, and board of directors. Every member or worker owner has a vote and the power to influence decisions in a co-operative. However, it is not enough to raise one's hand in a co-operative meeting and vote for or against something. The right to vote has to be used very carefully. The way one votes on a particular issue should be informed by an understanding of the issues or problems being addressed. The problems facing a co-operative range from failing production, corruption, lack of education amongst members about how the co-operative should work and so on (refer to the problems the group identified above). Some problems may have many solutions, and thus a decision must be made about the best solution. Making a decision is only one step. Decisions must be implemented or put differently action must be taken. But action can have unintended consequences. For example, after action is taken only part of a problem may have been solved or sometimes the problem gets worse. This requires an evaluation to rectify the situation and move forward.

In general using the problem-solving approach to make decisions requires the following steps:

1. Step 1 - Identify the problem
2. Step 2 - Generate a solution or solutions
3. Step 3 - Choose from amongst the various solutions (i.e. make a decision)
4. Step 4 - Action must then be taken to implement the decision
5. Step 5 - The outcomes of the action must be assessed to establish whether the problem was solved. If the problem was not solved or new problems created the problem-solving process or loop continues following the same steps.

the struggle for societal transformation must begin by asking some fundamental questions. Why is power concentrated amongst a few people? Why is society organized in this way? What is the nature of our suffering? Most importantly, what are the weaknesses of the system? Who are the other people that suffer under the system and how do we join with them to struggle for transformation?

With the current way our society is organized a few people own the factories and economic enterprises, while the majority work in them and earn wages. This leads to a society divided into classes (i.e. capitalist class, middle class, and working class which includes the self-employed and unemployed). The class divisions in society gives certain groups of people more power than others, leaving the majority of the people oppressed by those who have power. One way the powerful few wield their power is through the control of ideas which serve to direct society in their own interests. They exercise this control of ideas through the media, the universities and other powerful institutions that form ideas and influence society. In this way, the national interest becomes the interest of the capitalist class.

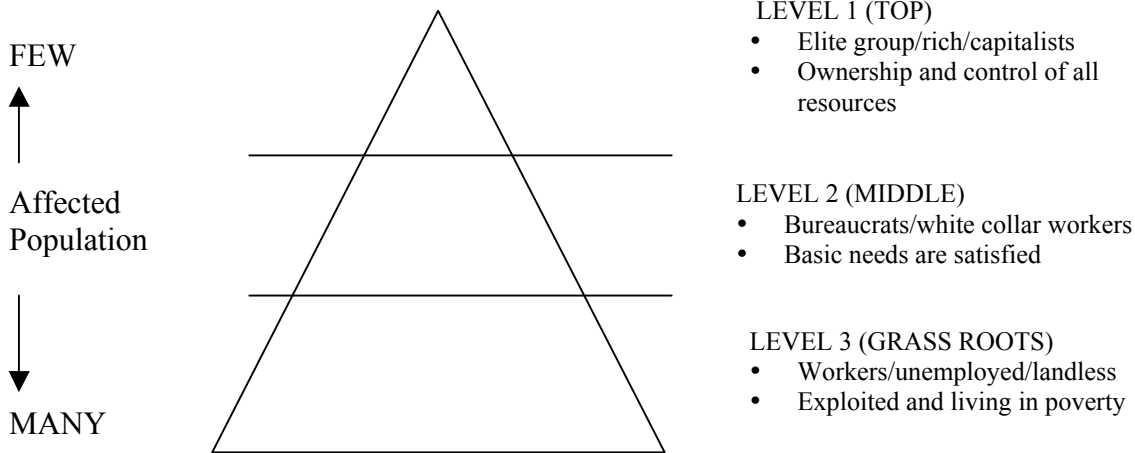
In South Africa, with the discovery of gold and diamonds the white minority built up an economic system that benefited them while exploiting the black majority who worked on the farms, in the mines and factories. The unjust economic system was supported by an oppressive political system in which oppressor denied the majority the right to vote and ultimately through apartheid ensured that power remained in their hands.

For the capitalist system to work it has to maintain certain levels of unemployment and poverty as it requires a reserve army of unemployed who are willing to compete for employment at low wages. At the same time, the capitalist system has always had its own internal crises. It over-produces, which then requires it to destroy and rebuild (i.e. the growth cycle of boom and bust). In the current period, its crisis comes from the increasing use of machines and technology rather than workers. This means fewer and fewer people are employed (as they are replaced by machines), earn a wage, and are able to buy the goods and services produced. In addition, the capitalist system is plundering our natural resources (e.g. using up oil supplies, destroying our forests, and wasting clean water supplies). The effects of wasteful capitalist production has led to pollution of rivers, poisoning and erosion of land, depletion of the ozone layer (which increases temperatures on earth and is melting the polar ice caps), and the elimination of whole species of animal and plant life. Most importantly it has made us dependent on the few elite for our survival. The dazzle of the marketplace keeps us blind to the deep-seated rot and problems.

Furthermore, the capitalist system affects women disproportionately as it exacerbates their oppression. The dominance of men is entrenched through male-centered employment, traditions and culture (e.g., adverts that promote an image of women either as mothers or sex symbols) and violence against women. In South Africa, poor and working class women suffer from triple oppression: race, class, and gender. The majority of poor women are mainly rural, black, and exploited workers or unemployed. The voices of the majority of women are still struggling to be heard.

Plenary Group Exercise: The Pyramid (three level triangle)/The Alternative

The facilitators draw up the diagram of The Pyramid. While it is being drawn up the facilitators explain the 'class pyramid'.



The facilitator then asks the group the following questions in a self-reflection exercise.

- 1. Where do you fit in on this pyramid?*
- 2. Do you want to be part of it?*
- 3. What vision do you have for the future?*
- 4. How would you organize society so that the needs of the “grass roots” are met?*

The group breaks into their small groups and each group comes up with a diagrammatic representation of the alternative. Feedback is given from each group and the facilitator summarizes what has come up in the discussion.

1.5 The Struggle for Social Transformation and the Liberation of Consciousness

Sometimes problem-solving leaders are not able to rise to the challenges that they are confronted with and simply feel overwhelmed. Many throw up their hands and surrender. Some of the reasons problem-solving leaders give up include fatalism (failure is inevitable), pessimism (everything is bad), lack of technical empowerment, lack of experience, and just passiveness.

The key to a successful problem-solving leader is to recognize the link between social transformation and advancing the interests of the co-operative in particular and the co-operative movement in general. In other words, working class led struggle of and by the co-operative movement is necessary to ensure problem solving leads to social transformation. Put differently, to solve the problems facing a co-operative means solving the problems of the co-operative movement and ultimately of society. If the problems of a co-operative are not solved then the problems of the co-operative movement and of society get worse.

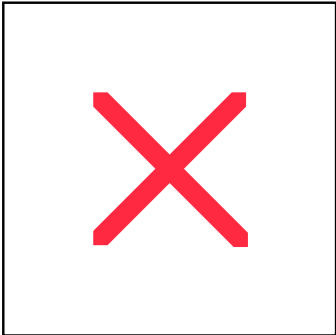
All history has been the history of class struggle
Communist Manifesto, Karl Marx and Friedrich Engels

In the course of struggling to advance the interests of working class led co-operatives and a co-operative movement it is important to recognize that change can only happen through asserting the needs, interests and aspirations of the co-operatives and the co-operative movement. In other words, as co-operatives advance and address their concerns for society they must also place their demands against (and for an alternative to) the system on the agenda of society.

We have not made a single gain in civil rights without determined legal and non violent pressure...Freedom is never voluntarily given by the oppressor; it must be demanded by the oppressed. *Martin Luther King*

The terrain on which co-operatives struggle today is increasingly interconnected with other struggles. The struggle of co-operatives for local production, for example, contributes to the lowering of imports from other countries. This means less is bought from transnational corporations and more is spent in local communities. This struggle for local production ultimately further fuels the crisis of the system. A self-reliant co-operative movement in a local community can have profound effects on the national, regional and global economy. In this way, the saying “Act Local, Think Global” becomes a truism.

Who owns the planet?



Who makes the decisions about the planet's future?
Who controls the planet's resources?

Group Based Exercise: Identify forces against and in support of a transformed society

Have the participants break into their smaller groups. Every group should draw a line down the middle of a page. On one side identify the forces against the vision of a transformed society globally, nationally and locally. On the other side identify the forces supporting the vision of a transformed society.

Allow time for each group to complete the task and then have a feedback session to the group.

In South Africa, capitalism and apartheid undermined our humanity. Black workers were mainly forced to be unskilled and uneducated labour for the mines, farms and factories. Racist ideology propagated by the system made blacks feel inferior. This feeling of inferiority led some to believe they were not capable of solving their own or society's problems. With our new democracy and as a society we have started to challenge this experience. As we move forward we also have to challenge gender oppression and ecological destruction. In short, the future of the new democratic South Africa has to be non-racial, non-sexist, non-exploitative and eco-friendly. We have to ensure the liberation of consciousness that we have achieved through decades of struggle does not degenerate. In this struggle we cannot let our principles be compromised. For example, we cannot let racism replace non-racialism, which would amount to us becoming like our oppressors (i.e. our freedom cannot be defined as reverse racism). In this regard the co-operative movement and problem-solving leaders have to be part of defending and advancing these principles. The transition to a new society has just begun. It is going to be a long and difficult road with many attempts to pull us back into the past.

Group Based Exercise: Your story of change

In groups each participant shares his/her experiences.

- Tell us your story of what prevented you from making progress in your life?
- How have you struggled against the hardships and suffering of oppression?

It is important that the facilitator creates a warm and supportive environment so that the participants feel understood and supported.

Plenary Group Exercise: Discuss Quote

What does the quote below mean for the struggle to ensure a non-racial, non-sexist, non-exploitative and eco-friendly South Africa?

I think the place to start is to recognize the individual's quality of incompleteness, of being an unfinished product. The vestiges of the past are brought into the present in one's consciousness, and a continual labour is necessary to eradicate them. The process is two sided. On the one side society acts through direct and indirect education; on the other, the individual submits to a conscious process of self education. *Che Guevera – From Socialism and Man in Cuba, 1965*

Module 2 – Co-operative Leadership and Problem Solving

2.1 The unity of theory and practice for a co-operator and co-operatives

It is not enough for co-operators to simply recite and regurgitate the values and principles of a co-operative. The values and principles of co-operatives have been developed over a long period of time – through practice and reflection. It is important for the theory (e.g. the ideas, values, and principles) to be translated into real practice that seeks social change and transformation.

Philosophers have only interpreted the world, the point however is to change it.
Theses on Feurbach, Karl Marx

As practice unfolds, guided by the values and principles of co-operation, the world within and around co-operatives will change. That is, guided by theory, but through actual practice communities, cities, provinces, the country and the world will change. However, if the link between theory and practice is not maintained, there is a real danger that co-operatives will no longer be co-operatives, but rather will become something else.

Plenary Group Exercise: Applying Problem Solving

The facilitator writes up the questions on flip-chart paper so participants can refer to the questions in discussion.

Discuss the following questions:

- What are the problems in your community?

- How can the struggle for co-operation and co-operatives solve these problems?

Co-operatives are part of the alternative to the present social system. In establishing them we are transforming the present system and are putting in place an important building block for a society in which we liberate our labour, develop our consciousness such that we share rather than compete with each other, and achieve freedom from necessity (poverty, homelessness, hunger and so on).

The facilitator explains to the group that there are universal principles and values that all co-operatives must adopt when establishing and working within a co-operative. These values and principles are adopted by the International Co-operative Alliance. These values and principles would be adapted to suit the needs and aspirations of co-operatives.

2.2 Values

Co-operatives are based on the values of **self-help, self-responsibility, democracy, equality, equity, and solidarity**. In the tradition of the founders of co-operatives, co-operative members believe in the ethical values of **honesty, openness, social responsibility, and caring for others**.

2.3 Principles

The co-operative principles are guidelines by which co-operatives put their values into practice.

1st PRINCIPLE: VOLUNTARY AND OPEN MEMBERSHIP

Co-operatives are voluntary organizations, open to all persons able to use their services and willing to accept the responsibilities of membership, without gender, social, racial, political, or religious discrimination.

2nd PRINCIPLE: DEMOCRATIC MEMBER CONTROL

Co-operatives are democratic organizations controlled by their members, who actively participate in setting their policies and making decisions. Men and women serving as elected representatives are accountable to the membership. In primary co-operatives members have equal voting rights (one member, one vote). Co-operatives at other levels (e.g. secondary co-operatives) are organized in a democratic manner.

3rd PRINCIPLE: MEMBER ECONOMIC PARTICIPATION

Members democratically control and contribute equitably to the capital of their co-operative. At least part of the capital is usually the common property of the co-operative. They usually receive limited compensation, if any, on capital subscribed as a condition of membership. Members allocate surpluses for any or all of the following purposes: developing the co-operative, possibly by setting up reserves, part of which at least would be indivisible; benefiting members in proportion to their transactions with the co-operative; and supporting other activities approved by the membership.

4th PRINCIPLE: AUTONOMY AND INDEPENDENCE

Co-operatives are autonomous, self-help organizations controlled by their members. If they enter into agreements with other organizations, including governments, or raise capital from external sources, they do so on terms that ensure democratic control by their members and maintain their co-operative autonomy.

5th PRINCIPLE: EDUCATION, TRAINING AND INFORMATION

Co-operatives provide education and training for their members, elected representatives, managers, and employees so they can contribute effectively to the development of their co-operatives. They inform the general public--particularly young people and opinion leaders--about the nature and benefits of co-operation.

6th PRINCIPLE: CO-OPERATION AMONG CO-OPERATIVES

Co-operatives serve their members most effectively and strengthen the co-operative movement by working together through local, national, regional, and international structures.

7th PRINCIPLE: CONCERN FOR COMMUNITY

While focusing on member needs, co-operatives work for the sustainable development of their communities through policies accepted by their members.

Plenary Based Exercise: Principles of the co-operative movement

The facilitator opens the brainstorm on what is our understanding of the word principles, referring to the glossary if necessary and then asks the group the following questions.

- What are the values and principles of the existing social system?
- How do the values and principles of co-operation assist us to struggle against the present social system?

2.4 The Challenge of Building a Co-operative Movement

To build a strong and powerful co-operative movement in South Africa it is important to clarify the following:

- The key lessons to be learned from co-operative history internationally and locally;
- The neo-liberal capitalist threat to co-operatives;
- The key strategic challenges for a strong and vibrant co-operative movement.

History

The first modern co-operative was experimented with in Rochdale, England in 1844. It was a consumer co-operative which succeeded for an initial period in providing cheap food to its members. However, as it became successful it attracted outside investors who

where not interested in the co-operative meeting the needs of its members, but were more interested in ensuring a return on their investment.

In Germany during the middle of the 19th Century the first modern credit union movement took root. It developed from providing consumer credit to developing its own central or reserve bank.

Around 1894 the International Co-operative Alliance was formed to be the umbrella body for co-operatives globally. Two key factors changed the nature of co-operatives in the 20th Century. The first was the use made by colonial authorities of co-operatives as instruments of development and control. This was done under British rule in many parts of the world from Sub-saharan Africa to India. These “colonial co-operatives” were part of the system of colonial rule. The second factor was the Russian Revolution of 1917 which attempted to organize society on a socialist basis. Under the guise of the dictatorship of the working class, this regime used co-operatives in various areas of production and exchange. Essentially these co-operatives were state controlled and managed. The land and other assets were owned by the state and managers were appointed by the state. This model inspired other socialist experiments and revolutionary nationalists in the Third World struggling to develop a postcolonial economy.

The lessons to be learned from this short history suggest the following. Firstly, co-operatives have a transformative potential and can be used as a counter to the negative features of capitalism and can open up a counter-logic in the system.

Secondly, without the proper ideological and political direction given to co-operatives they can also degenerate and become typical capitalist enterprises (a trend or tendency seen in many countries).

Thirdly, co-operatives developed in the former Soviet Union and the postcolonial Third World had two major problems. They have either been controlled by state bureaucrats or merely existed as part of a corrupt political system in which patronage support was distributed to those within the co-operative movement that supported the ruling party. This form of control distorted the essence of a co-operative.

The Neo-liberal Capitalist Threat

With the collapse of the Soviet Union in 1989 and the triumphalism of capitalism in the 1990s, there is a conscious attempt to appropriate and present co-operatives as a capitalist tool or instrument to ensure economic development. Co-operatives are being wedded as “free private enterprises” to the neo-liberal agenda of privatization, deregulation, and liberalization. This battle of ideas over the definition of a co-operative (e.g. what a co-operative is) is happening in many ways and through various institutions of capitalist domination such as the World Bank and even the International Labour Organisation.

In the main three challenges are being posed for co-operatives to adapt to neo-liberal adjustment and its economic policies. The first theme emphasizes the opportunity neo-liberalism offers co-operatives in the Third World and countries in the former second world that are in transition to market economies, to reclaim their autonomy from the state. The end of state control and intervention in the economy inaugurates a new balance between state and market. Thus co-operatives need to embrace the only logical economic space for their continued survival and renewal, that is, the market. Terms like a “co-operative sector” or “third sector” are jettisoned, and the economic viability and the general orientation of co-operatives is conflated with the market and ultimately the private sector.

Linked to this theme is a minimalist state policy on co-operatives which merely provides a simple legislative framework, preferably in plain English, and which is enabling. Policy incentives, protective measures and other training supports from the government are rejected. The alternative being advanced by neo-liberalism is greater emphasis on support for apex organisations to play a role in policy making, training and strategy development or full blown conversion of co-operatives into companies. Most donor programs are focusing on the former.

The third theme compliments this thrust by arguing for a new kind of management in co-operatives to ensure they are “globally competitive.” Co-operative experts are arguing for the end of “worker control” and “self management” and instead talk about the promotion of the new kind of co-operative manager who operates with the values of co-operatives but who understands the efficiencies of the market. In addition, some experts go further than this to argue for managers to be given voting (and possible ownership) rights in boards. In other words, it is only through embracing this new kind of co-operative management option, it is argued, that co-operatives can deal with the global market and the necessary challenges of economic adjustment.

From the standpoint of the basic principles of co-operatives, the neo-liberal appropriation of co-operatives into the globally competitive market, with minimal state support and typical managerial prerogatives, opens the way for degeneration and in most instances the collapse of co-operatives. Profit maximisation supplants the common need of co-operators.

Main Strategic Challenges to Build a Co-operative Movement in South Africa

Linking Co-operative Development with Sustainable Local Economic Development

Co-operatives cannot be built as little islands on their own. They have to be part of a movement in order to prevent negative tendencies. Firstly, the tendency toward self exploitation is a constant threat to the extent that they are not able to compete with capitalist enterprises unless they impose cost cutting measures, usually poverty wages, on their worker owners. Secondly, co-operatives can degenerate in the sense that they lose sight of their objectives and the importance of meeting the needs of their members, and instead concentrate on a non-member market and “efficiency” in a capitalist sense. In

short, co-operatives in this context become exclusively for profit or capitalist enterprises by targeting the entire market rather than meeting the needs of their members.

To overcome these potential threats co-operatives have to be built at a local community level as part of local co-operative movements. This has to happen on both the demand and supply side of the local economy so that a socialized market is developed. For example producer co-operatives have to link with consumer co-operatives. Or a secondary co-operative like a development credit union has to provide cheap finance to its primary co-operative members. The opportunity exists for this to happen through Integrated Development Planning processes. In addition many local governments are committed to SMME support as part of their local economic development strategies, which provides an opportunity for co-operatives. Underlying all these co-operative development initiatives, on both the demand and supply side of the local economy, would be the challenge of ensuring sustainability. Human, natural, land and finance resources must be used in such a way that ensures the maintenance for future generations. This means issues of sustainable energy use, alternative transport like bicycles, waste recycling, community-based development credit unions, food security through organic farming, and environmental awareness against pollution have to be taken seriously.

Mobilising in Key Areas to Ensure Working Class Leadership of the Movement

A working class leadership is necessary to ensure a socialist orientation for both formal and informal co-operatives that are broadly part of the co-operative movement in South Africa. "Working class" in this sense means both workers who do not own the means of production (unionized and non-unionised), but also the self-employed and peripheral workers and most importantly radical intellectuals that are aligned with the working class. Practically speaking this means a "worker owner model" has to be championed as the generic model for co-operatives in South Africa. Very importantly, there is a need to organise the working class (employed and unemployed, rural and urban) into the co-operative movement. This means working closely with trade unions, working class communities, rural villages and former combatants as priorities of mass mobilization to educate, organise and build the co-operative movement.

Trade unions should not just use co-operatives defensively, but should also see them as part of an offensive strategic approach that promotes worker takeover and buyouts. In both working class communities and rural villages there is a need to promote co-operatives as development institutions that can organise local labour, capital, land and other resources into a model of self-reliant and sustainable local economic development. In this regard, it might be important to promote local co-operative movements made up of cornerstone co-operatives like a community co-operative bank, a labour and technology co-operative (which distributes work rights to the unemployed members within local economic development projects and refurbishes second hand technologies which can be borrowed for productive purposes by co-operative members), waste recycling co-operatives (that also engage in processing things like recycled paper, toys, etc), arts and crafts co-operatives and organic farming co-operatives (with either of the latter co-

operatives running a local community market). All of this stimulates dynamic local economic activity and a sustainable growth path.

Building a Party-Movement Relationship with NCASA and the Wider Co-operative Movement

Both the SACP and the ANC need to clarify their relationship with the National Co-operative Association (NCASA) and other independent and informal co-operatives that make up the co-operative movement in South Africa. NCASA is an apex body that was developed in 1996 and has brought in sectoral co-operatives like the Savings and Credit Co-op League, Medical Co-op Association, Home Industry Co-op Association, National Community Co-op Association and the Agricultural Business Chamber. At the same time NCASA has attempted to build provincial structures and is even considering regional structures. NCASA's development has happened in a top down way and has been contrary to international experience (e.g., co-operatives do not have a sense of ownership of NCASA and most of the developing co-operatives do not believe in the services and support it can provide them and hence do not affiliate). While the debate on the organisational formation of NCASA is open and happening currently, the major issue is its orientation. The question of orientation can be summarized as follows: Should NCASA become the "Green House" and thus be the backbone for capitalist co-operatives or should it foster a mass-based socialist co-operative movement that builds relationships of solidarity and co-operation between co-operatives and within society and ultimately constructs, together with the state, a co-operative sector? How should the ANC and the SACP relate to NCASA so that it does not become an appendage of either organization? How can COSATU support the development of the co-operative movement in South Africa?

Policy Intervention to Create a Co-operative Environment and Sector in South Africa

Policy intervention can help create a co-operative environment and sector, which must happen through the co-operative movement and other allies linked to it. This would include some of the following issues:

- Facilitative legislation that is simple and easy to use for all kinds of co-operatives that are worker owned;
- Dedicated legislation for development based credit unions to be established;
- Accreditation and registration for NGOs providing support and training to co-operatives;
- Ensure all local governments align their local economic development strategies to promote co-operative development.

Plenary Based Energizer: Rainstorm

It is satisfying to have an energizer that the group especially enjoys. It can be used at different points in the workshop (e.g. when the facilitator or group members feel that the

energy level is low, a feeling of despondency due to the struggles and oppression participants have been faced with or creating solidarity between participants).

Everyone stands in a circle. The facilitator begins the storm by rubbing their hands together. One by one everyone copies the person to their right. Each individual does only what the person on their right does regardless of what the facilitator is doing. The facilitator moves from rubbing hands, to clicking his/her fingers, to clapping, to slapping his/her thighs, to stomping his/her feet. The storm abates in the opposite way to which it began – that is, from stomping and slapping to clapping, clicking and rubbing. The round ends with silence.

2.5 Leadership and Marginalised Groups

Plenary Based Exercise: ‘What is Leadership?’

The group has a brainstorm around the following question: ‘what is a leader?’ When ideas have been shared, the facilitator then asks smaller groups to discuss the following questions.

Give each group one of the questions to discuss which they will then present to the group and have discussion.

- Are leaders born leaders?
- Do leaders have experience and knowledge?
- Should a leader be balanced and care for individual, group, co-operative and society’s needs? Why?
- Are good leaders those who act and make decisions?
- Is leadership about influence?
- Is it better for leaders to work together or lead by themselves?

Plenary Group Exercise– Leadership Qualities

The facilitator leads.

Find a name of a South African leader/comrade. Then discuss his/her strengths and weaknesses.

Allow time for these discussions to grow, when the facilitator feels that the discussions are coming to a close, stops discussion and summarises what has been shared.

Challenges for Marginalised Groups

Exercise 1: Not all individuals have access to leadership even though they have all the characteristics of a good leader. What groups of people can you think of?

Perhaps brainstorm ideas with the group and write up on flip-chart.

Exercise 2: Marginalised groups/women/immigrants/religious groups etc.
Give participants reading (and make sure all read it) from The International Labour Organisation's address made to women in co-operatives on International Women's Day.

The facilitator can begin by reading a paragraph and then open it up to the group; participants volunteer to read pieces as the rest of the group listens.

GENDER READING – International Women's Day 8 March 2001

Joint messages from the International Cooperative Alliance President and Chairperson of the International Cooperative Alliance Global Women's Committee

Implementation of gender equality: The challenge for the co-operative movement in the 21st century

On 8 March, we will celebrate the first International Women's Day of the 21st century and the beginning of an era where gender equality will become reality. Co-operators worldwide know that the intertwining forces of gender inequality and conflict threaten peace and security worldwide and that the advancement of women is essential if we are to find effective solutions to today's global problems. Yet, women and children still continue to be disproportionately affected by violent conflict; they are victims of discrimination, intolerance, injustice and unfairness in both the industrialized and developing countries of the world. The international Co-operative Movement is committed to work towards change.

On the occasion of this International Women's Day, the international Co-operative Movement wishes to pay a special tribute to the thousands of women-co-operators worldwide who are engaged and committed to defending and promoting the co-operative principles and values. Through their action they contribute to establishing a society which puts people in the forefront, promotes solidarity as well as fair and efficient markets. ICA wishes to acknowledge in particular those women who have chosen the co-operative form of enterprise as a way of fighting against poverty, exclusion, segregation which in various forms and degrees continue to afflict a large portion of the world's women.

It is notable that women find that co-operative societies respond well to their needs. They know that the co-operative is a modern and vibrant enterprise; it is an enterprise which creates and maintains employment. Flexible in its organization, the co-operative enterprise is capable of seizing opportunities while skillfully adapting itself to economic and social change. It is both a grass-roots organization and a networked organization which enables it to benefit from economies of scale and be economically active at national and international levels. And, the co-operative builds people's confidence and strengthens democracy.

Today as we look back over the last decade, we recognize the progress made in addressing gender issues. We know that women's abilities and capabilities represent a fundamental resource that we cannot afford to ignore. Governments and individual organizations must provide conditions under which women can contribute effectively to producing this much needed global change and allowing us to seize opportunities and build an equitable, fair and peaceful society.

The ICA and the world co-operative movement have made their own contribution to promote the advancement of women in society and in the economy. ICA and its member organizations are fully aware that the new role that women play has significantly contributed to the positive economic and social development over the last years. However, ICA too recognizes that much remains to be done. ICA has reaffirmed its strong commitment to gender quality through the recently adoption of a Gender Strategy. The strategy sets out specific steps which the Co-operative Movement can take to increase the pace of change. It includes putting gender-equality dimensions into all policies and programme planning and implementation and calls on its members to review their policies in order to remove the obstacles and

invisible barriers that continue to hinder the full implementation of a basic co-operative value: equality between women and men.

Let us strive to make the 21st century a time for the fulfillment of women's rights and aspirations. Let the 21st century mark the realization of true gender equality in co-operatives worldwide.

This is a global challenge that we, co-operators, cannot afford to lose. We owe it to the present and future generations. Let us make the celebration of International Women Day a continuing celebration and not simply a moment in time!

The reading above is purely to spark thinking among the participants about women's roles in co-operatives. The facilitator asks the group the set of questions below, allowing time in between each question for discussion – it becomes an open brainstorm.

A working definition of gender:

People are born female or male, but learn to be girls and boys who grow into women and men. They are taught what the appropriate behaviour and attitudes, roles and activities are for them, and how they should relate to other people. This learned behaviour is what makes up gender and identity and determines gender roles

Plenary Group Exercise

Discuss the following questions:

1. Identify the difficulties/problems marginalised groups (women) are faced with in co-operatives?
2. How can these problems be addressed?
3. What changes need to take place?

The plenary discusses these questions.

The facilitator writes up points on flip-chart which are displayed for future reference.

Gender Issues in a Co-operative

What are gender issues in co-operatives?

Below are some specific gender issues of concern to co-operatives, and questions that co-operative leaders can ask themselves:

- Low level of participation in co-operative development and particularly that of women. **Are efforts being made to increase the membership?**
- Quality of women's participation in co-operatives. **Are women involved in decision-making processes?**
- **Constraints to participation in co-operatives such as social, cultural, economic and political restrictions on women, their heavy workload, level of education, or the selection criteria for members etc.** If any of these constraints exist, what is being done to **address the situation?**
- Access to and control over resources such as credit, education, training, production inputs and marketing outlets. **Do men and women have equal access and control over resources?**

- Co-operative training and education programmes. **Do these programmes address women's needs?** Are efforts being made to involve women, e.g. are meetings conveniently timed and **are childcare facilities available?**
- Financial and social benefits. **Is it advantageous for women to form co-operatives? Do co-operatives support income-generating activities for women?**
- The possible existence of gender bias. **Do gender-blind policies, practices and services exist within the co-operative?**
- **Lack of strong co-operative support and commitment to gender issues.** How are they addressed? Are gender sensitization programmes carried out?

What can be done to integrate more women into co-operatives?

- The first thing is to include gender on their agendas. The formulation of gender-sensitive policies, strategies and plans is essential. These should be drawn up in a joint effort between women and men.
- Co-operatives should address equality issues and make a firm commitment in their mandate to correct imbalances where they exist. For example, co-operatives can state their intention to address the problems of women's access to credit, land, equipment, extension services etc., and/or to take positive measures to include more women in their training programmes, in decision-making and leadership positions.

2.6 Co-operatives and problem-solving leadership

Plenary Group Exercise: Two case studies

The facilitator reads out each case study to the group and facilitates the discussion using the questions below.

Case study 1- Nelson Mandela

Nelson Mandela was a member of the ANC. He went to jail for 27 years.

Question:

- What kind of a leader was Nelson Mandela?
- What was the main problem that he was trying to solve?

Case study 2 – Chris Hani

Chris Hani chose to build the SACP rather than become a politician. As a leader of MK and both a senior leader in the ANC and SACP, Chris Hani was one of the most powerful people in South Africa. He led workers, advocated peace and consolidation of our democracy in the early nineties. Chris Hani worked tirelessly to ensure the popular support of the SACP was consolidated. He toy-toyed with the workers and he went down to the ground to listen to the problems of the people. He was murdered.

Questions:

- What kind of leader was Chris Hani?
- What problem was Chris Hani solving when he chose to build the SACP rather than go to parliament?

Day 2.

Module 3 – Understanding the Problem

- Some problems have many parts to them and it would be important to break them up into primary/main and secondary problems.

To graphically present this to the group have a collection of stones lying on the ground. Get the group to imagine that this is the co-operative with different issues. The trainer picks up one of the stones and says this is the problem that s/he has identified. The trainer then begins to brush the sand off the stone and tries to break it up into pieces. The trainer explains that they are now trying to understand the problem. It was found that this analogy of the stone clarified the participants understanding of the concepts of ‘identify’ and ‘understand’.

- All problems have causes and it is important to understand the root causes. For example it is easy to say a person is poverty stricken because they do not have a job. In other words, unemployment causes poverty. This is just one level of causation. **However, is unemployment the root cause of poverty or is the cause/s something else?**
- When a patient comes to a doctor with an illness the doctor has to go beyond the symptom like a headache and has to find the real cause. Similarly a problem-solving leader has to do the same with a problem to understand not just the appearance of the problem but its root cause.

There are many tools that can be used to understand a problem clearly. In this guide the following tools are used:

- Debate
- Listening
- Information management.

3.1 Tool 1 - Debate

- By presenting arguments for and against a particular issue a problem can be further clarified and broken up into its various parts.

- Debate is necessary in all forms of organisations including co-operatives and must be encouraged so that the organisation can learn from various viewpoints, analysis is deepened and issues are clarified.
- To conduct debate it is important to have preparation and effective presentation.
- Preparation simply means researching the issues if you do not have information and clearly setting out your arguments, preferably in writing. Presentation must be clear and reflect confidence but not arrogance.
- A debate is won or lost on the strengths of your argument.

Plenary Group Exercise: Agree/disagree Corner

Allocate three corners of the room according to the following: Agree Corner, Disagree Corner and Unsure Corner. The facilitator shouts out a statement and then ask people to make a choice on where they stand i.e. choose a corner. Then randomly ask a participant why they have chosen that corner – so as to generate thinking individually.

Some of the statements could be: “pap is the best nutritional food available to all,” “women can never lead a co-operative,” “socialism is the answer to building an alternative society,” and “leaders are born that way.”

Plenary Group Exercise: Open debate – ‘The rich are getting richer because of their own effort.’

Choose two teams of three- one for and another against this statement. Give them three minutes to prepare. Have each side alternate when having a turn or alternatively one person can speak per team. In the last round speakers must summarize arguments.

The facilitator leads the closing discussion observing and making a note of the questions and points below.

- How did the debate assist with clarifying the problem?
- Whether this tool helped everyone have a voice.
- One needed to think carefully before speaking as to have a good argument.
- Helped the group to listen to other group members.
- Create a deeper understanding of what was being said and moved at each individual’s pace.

3.2 Tool 2 - Listening

One of the deepest needs of all human beings is to feel understood and accepted by others. Offering understanding to another person is a potent form of empowerment. We need not agree with others to empower them in this way; we need only to make it clear through our eyes, body, posture and tone of voice that we want to see the world from their perspective. Our interactions with others must come from a point of deep, non-judgmental interest. The key is to grasp the why behind what is being said or done in order to gain insight into the deeper interests and needs of the person with whom we are communicating. From the moment that people feel you are truly seeking to understand, they begin dealing with problems and other people more constructively. Good listening skills are used throughout any process designed to constructively resolve conflict. Good listening is, perhaps, the most significant skill a facilitator or leader brings to assist parties in problem solving.

Plenary Group Exercise

Ask the group what makes a person a good listener. Write the words “good listener” at the center of the flip chart. Participants will throw out words. Write these words on the flip chart. Facilitate a discussion.

Some Do’s and Don’t s of Listening

In listening we should try to do the following:

- Show interest.
- Be understanding of the other person.
- Express empathy.
- Single out the problem if there is one.
- Listen for the causes of the problem.
- Help the speaker associate the problem with the cause.
- Encourage the speaker to develop competence and motivation to solve his or her own problems.
- Cultivate the ability to be silent when silence is needed.

Facilitator to do the same brainstorm as above with the words “bad listener” at the center of the flip chart.

In listening, **do not** do the following:

- Argue.
- Interrupt.
- Pass judgement too quickly or in advance.
- Give advice unless it is requested by the other.
- Jump too conclusions.
- Let the speaker’s emotions react too directly on your own

Plenary Group Exercise: Problem Tree ‘But why’

Explain to the participants: think of the problem as a tree, it has the main problem which is the trunk, the root causes which are the roots and the effects of the problem are the leaves. Select a problem to be the trunk of the tree. Then ask participants to brainstorm together using the ‘but why’ question in order to fill in the roots, leaves etc.

It is important that the facilitator demonstrates the tool. If the facilitator feels that the group would benefit from each group practicing the tool, break the group into small groups and then give time for each group to present their ‘problem tree’. This can be a very empowering exercise.

3.3 Tool 3 – Collecting and Using Relevant Information

- Without accurate and adequate information about a problem, a leader cannot solve the problem. It is important to know how to obtain information and how to use it.

- There are five key steps/questions problem-solving leaders must ask themselves about information that is necessary to clarify the problem:

(1) How much do we already know?

To answer this question right up a list of things you already know on a piece of paper.

(2) What more do we need to know?

This means knowing all the facts or as much as possible to ensure the problem is clear.

(3) How can we get more information?

There are many ways to get information about a problem these include:

- asking around – neighbours, friends, comrades, co-op members
- written material – books, newspapers, magazines
- broadcast sources- - TV, radio, internet
- research using libraries, resource centres, questionnaires, focus groups
- expert advice – employ professional researchers

(4) How reliable and valid is the information?

Information received has to be cross checked to make sure it is accurate or correct. This means drawing up a checklist that asks critical questions like:

Who supplied the information?

Is it internally consistent?

Is the source reliable?

Is it too brief?

Is it complete?

Do I understand it or do I need someone to interpret it for me?

(5) How can I represent this problem as a diagram?

Plenary Group Exercise: Looking at your problem

The facilitator takes one of the problems, identified at the beginning, which has not been discussed. The facilitator applies the steps above to demonstrate how information management works as a tool. If there is time other examples could be used.

Module 4 – Finding Answers

Plenary Energizer

‘Making the longest line’: the participants form themselves into 2 groups. Each group has to make a line as long as possible across the room using anything they have on their persons. They must not get anything from anywhere else. At the end of the 5 minutes the facilitator decides which is the longest line.

The purpose of this activity is to allow for creativity and it gives the sense of working together to establish a goal. One will find that participants take up the different roles of either being leaders or listener. Make sure there is enough space in the room, if not move outside. This activity creates a great deal of energy and safe space in the group.

4.1 Tool 1 – Option Generator

The facilitator leads the input asking the questions below to the group.

Option Generator

- Asking critical questions is one way of generating answers to a problem.
- We need to use inquisitiveness or curiosity to find answers.
- These questions cover:
 1. Can we use an answer or solution from somewhere else? (Can we copy an answer?)
 2. How can we change the problem into an opportunity?
 3. What can be joined together to provide a solution?
 4. What can be ignored?
 5. What can we build on?
 6. What can be bypassed?
 7. Can we re-arrange the elements that we are currently working with?
 8. Can we start at the end?
 9. Can we do just the opposite?
 10. Can we speed up the process?
 11. What new targets can we put in place?
 12. Can we improve what we are already doing?
 13. Will we worsen an already difficult situation?
 14. How can we snatch victory from the jaws of defeat?
 15. Don't ask what if it doesn't work, ask what if it does?
 16. What if we try...?

You don't have to be educated or literate to be able to think

Plenary Based Exercise

The facilitator takes the group through the following example and questions.

The co-operative is unable to develop a financial management system.
If we were to use the first four questions of the option generator the following answers can be found to this problem:

Can we use an answer and solution from somewhere else?

Yes. We could look to other co-operatives and their financial management systems.

How can we change the problem into an opportunity?

This gives us a chance to run a training workshop on financial management. Or it could mean sending the treasurer and her team to get a diploma or other kind of formal training on financial matters.

What can be joined together to provide a solution?

We could send the treasurer to work with another co-operative for two or three months to learn the skills. Or we could ask a professional trainer to come in and work closely with the treasurer.

What can be ignored?

We can ignore arguments to remove the treasurer or other forms of negative thinking because the problem is not with an individual. The problem exists because the organization has failed to develop the necessary financial systems. Maybe after the training and the financial systems are put in place can the co-operative consider replacing the treasurer if things are not working out.

Group Based Exercise: Option Generator

In one year's time the co-operatives face a problem of under-production. How can this be improved?

Break the participants up into groups and use the option generator. The participants use the questions to solve the problem. Write up answers.

4.2 Tool 2 - Quantum Leap Thinking

This tool exaggerates the target or objective as a means of helping us find the solution. For example, rather than choosing to have a turnover of R30 000 per annum, set the target 3 times that target. Then ask the question how do we achieve this? List the steps to achieve R90 000 turn-over per annum instead of R30 000 per annum. Question: what difference does this approach have to providing a solution to the problem?

Group Based Exercise: Quantum Leap Thinking

The co-operatives have to grow from 20 members to 50 members by next year. Write down both the new target and how this target would be achieved?

Module 5 - Making decisions

- After a problem is defined and solutions generated it is necessary to make decisions between alternative choices.
- Decision-making must happen through the correct frame of mind - sober mood, knowledge and conviction.
- Decision-making is necessary to ensure action and commitment.
- Sometimes decision-making can be deferred or put off.

Plenary Group Exercise: Decision making Challenges

This question is asked to the group as a way of conscientizing themselves, making them aware that decision making is a difficult process.

When would you put off or give the decision making to someone else?

- Decisions should not be made impulsively;
- Decisions made in a crisis or emergency must be decisive and might have to weigh up the lack of information against the costs of non-action;
- Involvement in a decision is very important;
- Decisions must be made in an informed way in order to solve problems;
- Tools for decision-making.

5.1 Tool 1 - Objectives, Aims and Interests

- Objectives are contained in the legal statute of the co-operative and basically refer to what the co-operative wants to achieve through its activities during its existence to meet the needs of its members. For example, the co-operative members might have needed employment and hence the objective of the co-operative written into the statute is to create jobs to benefit its members.
- It is important to clarify aims when making a decision because the aim of a decision must advance the objectives of the co-operative.
- Aims must embody the co-operative's interests.
- Objectives must be used to make decisions. In other words, to what extent do the solutions/actions advance the objectives of the co-operative?

Example: If the co-operative is faced with the challenge of a water shortage. It can decide to approach the council or attempt to pay for water. Do these two options realize the aims of the co-operative?

5.2 Tool 2 – Priorities

- Sometimes there are many options or solutions that could solve a problem.
- Decisions can be made by prioritizing the options and the one with the highest priority can be chosen.
- Prioritisation can happen by providing a simple ranking from 1 to 10 for options/solutions and the one with the highest ranking can be chosen.

Small Group Exercise: Choosing Your Co-operative Priorities

If the co-operative wants to increase its membership it could do several things. For instance, have targeted education, approach people to join, advertise the co-operative and maybe have a mass rally to mobilize membership. From all these choices a ranking can be given from one to ten and a choice can be made on the appropriate action to be taken. Prioritize in a list of 1 to 10 which action your group would choose listing the pros and cons of your choice.

The tool is linked to the third tool of debate which is discussed below. Perhaps this exercise and the one below can be linked depending on how quickly the group has been able to grasp ideas and your time constraints.

5.3 Tool 3 - Debate

- Debating the pros (positive, advantages) and cons (negative, disadvantages) of each option or solution is another way of arriving at a decision.
- If the pros outweigh the cons then an option or solution can be chosen.

Plenary Group Exercise: Pros and Cons

A co-operative can choose to use volunteer members to work. What are the pros and cons of this decision?

The facilitator draws two columns on a flip-chart labeling one the pros and the other the cons. Then the group has a brainstorm listing them.

Day 3

Module 6 – Taking Action

6.1 Tool 1 – Planning Using a Timeline

Through the use of the ‘Timeline’ everyone has to arrive on a consensus before a decision is made. This helps us see our plan.

Group Based Exercise: Timeline

Draw a line on the ground using a stick or use chart paper and mark off at different points what goals one should achieve at certain times. On one side of the line write down months, days or dates. On the other side write down what one wants to have achieved by that time (e.g., a meeting with the leader in your community, when you will be using the truck to deliver vegetables, proposal for more funds etc.).

6.2 Tool 2 - The five friends of Planning

- This refers to the why, what, how, who and when of planning;
- If these questions are answered then planning can be achieved in a practical way;

Plenary Based Exercise

This activity can be used in any situation. In this section it is being used to plan how a group can move forward on actions they have chosen to empower themselves.

Purpose

- To motivate the group to work toward a solution.
- To plan how the group will achieve their goal.
- To provide a mirror for the group to evaluate their progress toward the solution they have chosen.
- To assess the level of independence of the group – how much they depend on outside resources for their solution.

Steps

1. Benefits of the Solution

The facilitator asks the group to draw a picture of their chosen outcome in the centre of a piece of flip-chart paper. Then the facilitator asks the group what they expect the benefits from this outcome will be. As each benefit is named, it is discussed and drawn around the outcome, indicating the expected benefits of the outcome for themselves and their community. All these benefits are discussed by the group as they are added to the picture.

NOTE: This is called an Ah-ha experience because it helps the group members visualize what it would look like if their solution was implemented – they say ‘ah-ha’ to acknowledge their insight into the solutions and benefits they identify.

2. Planning

With this clear picture of what they want to have happen and how they hope to benefit, the facilitator then asks the group to plan what they will do so that all these things can happen. S/he describes the five friends of planning: naming why, what, how, when and who on each of her/his fingers. Using the hand to ask these questions is a way of helping people remember what to consider for good planning to take place.

NOTE: If there is one solution to be worked on, it can be done in the group with the facilitator leading the planning, asking the questions and getting the group to record their answers. If there is more than one plan to be worked on, the group is divided into smaller groups and asked to plan according to the five friends of planning. The detailed questions are:

Question 1: Why do you want to do this?

This should have already been addressed when the group considered what the benefits would be if they worked toward the solution. This becomes a moment of ah-ha for the group as they realize why they would work hard to make their plan happen.

Question 2: What resources will you need?

Here the group identified what skills and resources they will need, which ones they have and which they will need to find.

NOTE: This step helps the facilitator to see what resources are needed and if the group has all the necessary inputs locally. If not, the facilitator can be of help making the needed resources accessible to the group.

Question 3: How will you do it?

Here the group identifies all the steps to work on toward their goal. Each step is drawn in a separate piece of paper so they can be arranged in the proper sequence in terms of what is the first step, the second step, the third step and so on.

Question 4: Who will be involved, who will do what?

For every step in the plan, the group identifies who will be responsible for making that step happen.

Question 5: When will you start and hope to finish?

This discussion helps the group to share with each other what their expectations are in relation to when they will start and what target dates are set for when they hope to see their solution a reality. The steps along the way also need to have target dates.

3. Presenting the Plans

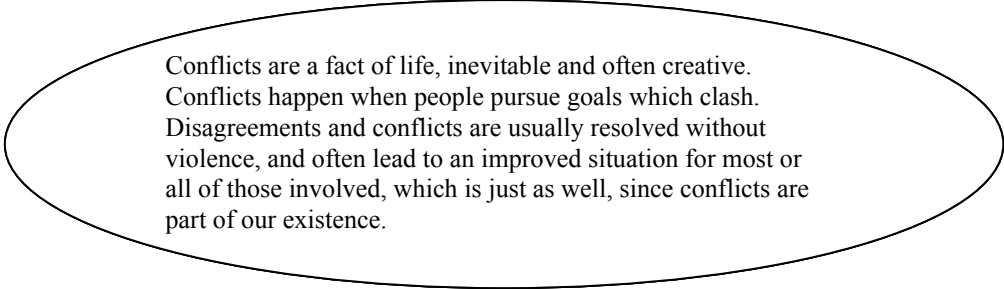
The groups present their plans to each other and questions are asked to make sure the plan is clear to everyone. Also, comments are given to support the plan and improve it.

4. Ready for Action

The plan is set and the group is ready for implementation on their own.

5. Evaluation

The group is asked to keep track of their progress toward their goal by referring to their plan on a regular basis.

6.3 Tool 3 - Conflict Resolution (Negotiation and Mediation)

Conflicts are a fact of life, inevitable and often creative.
Conflicts happen when people pursue goals which clash.
Disagreements and conflicts are usually resolved without violence, and often lead to an improved situation for most or all of those involved, which is just as well, since conflicts are part of our existence.

Plenary Group Exercise: Human knot

The whole group stands in a circle close to each other, shoulders touching. Each participant extends his/her arms forward above their heads and closes his/her eyes. Each participant then moves closer to the middle of the circle, moving slowly, reaching for hands to hold. When all the participants have found hands to hold, they are then told to open their eyes. The neat circle will now be a messy mass of twisted arms. The group's task is to untangle the knot without letting go of their hands so that a circle is formed with everyone holding hands of the person beside them without crossed hands.

Have feedback after the exercise explaining that is how we find ourselves in a conflict situation. We go into the situation blind like when we had our eyes closed. We need to develop a consciousness about the situation so as to understand it. The task being to untangle ourselves, we had to work together, listening and helping one another so as to establish our task. Working together in a conflict situation is vital for an understanding to develop. This activity acts as an excellent introduction to open up discussions on conflict resolution.

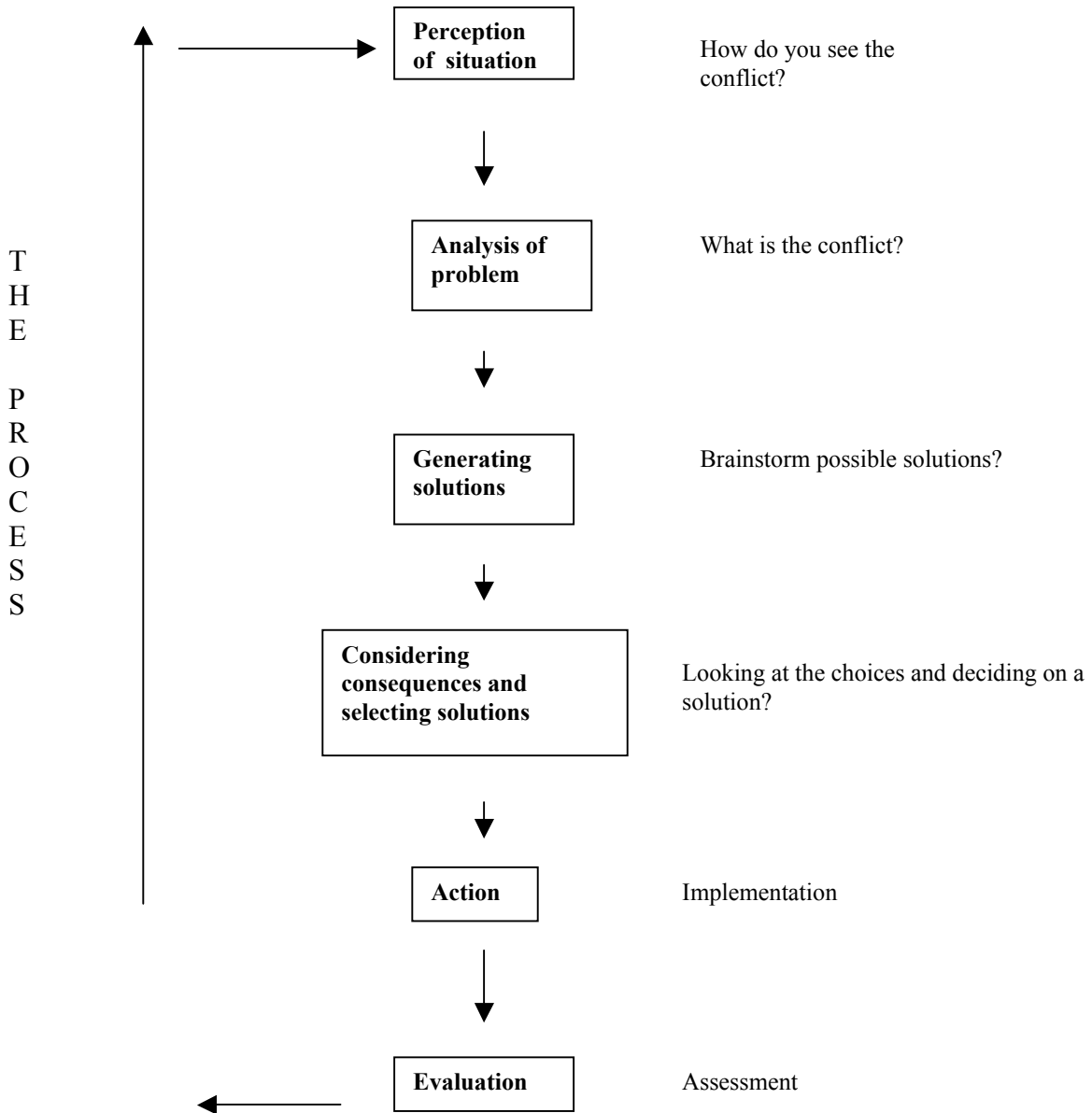
- To resolve a conflict it is important to communicate.
- Talking through and discussing issues that cause the conflict is essential.
- There are three main causes of conflict:
 1. clash of interests
 2. a clash of personalities
 3. misunderstanding

Mediation

- To solve a clash of interests it is important to negotiate to solve the problem.
- With the other causes the only option available is mediating the conflict.
- Mediation helps the parties clarify the issue and decide on the best solution to solve the problem.
- Mediation happens face-to-face with both parties and then separately. The mediator does not present a final decision but merely gives the parties options and then they decide.

Steps in the conflict resolution process

Questions to understand the process:



If one is mediating or an active member in conflict resolution these steps help to clarify the mediating process.

The facilitator can ask for the participants to think of one or two real life situations and then work through the steps of mediation.

Self reflective Exercise: Understanding Conflict

These questions are asked to the large group and a moment is given for the participants to reflect on their own lives and how conflicts have affected them. If people want to share be open to this, as it may be the first time people are realising that conflict can be very positive.

- How many conflicts are you aware of at this moment?
- Can you think of a situation, from your own experience, where conflict has made a positive contribution?

Be the change you want. Mahatma Gandhi

Negotiation

- The aim of good negotiating is to change from confrontation to problem solving.
- The prize in good negotiation is satisfying your interests not obtaining your position.
- Try reframing the question to make a joint problem solving i.e. get the person to help you understand their concerns.

Steps to follow to have a clear negotiating agenda:

1. Identify your interests.
2. Work out 'bottom line' (what you would settle for) and then work out ideal outcome.
3. Plan arguments that will be presented.
4. Make sure you are negotiating with someone who can make final decisions.

Small Group Exercise: The Negotiator/role play

Role play is a very effective way of allowing participants to experiment with their skills and provides a safe place where people are able to practice new skills they have acquired in the training.

The co-operative requires a water connection. It cannot afford the connection. The person from the co-operative has to plan their negotiations with the council. The co-operator makes a visit to the council office and has a meeting with the councilor. Role play the situation using negotiating skills from both the councilor and the co-operator.

Give the pairs time to develop a negotiated situation with a solution. Then each pair does their role play for the rest of the group. Feedback is given to each group.

Perhaps important points that come from the group can be written up on flip-chart.

Plenary Group Exercise: The skills of a Negotiator

Have an open brainstorm. On flip-chart write the word 'negotiator' in the centre and then allow the participants to shout out what are the things that make up a good negotiator. As they are shouted out the facilitator writes them up around the word 'negotiator'. Once the group has come dry with ideas the facilitator can summarize what has been written up, explaining that we are all aware of the skills of a good negotiator, but it is important to remember them.

Module 7 - Outcomes

The facilitator should refer back to the drawing of the problem-solving loop in order to make a reconnection for the participants and to bring everyone on board in terms of the process that the training is working through.

- Have you solved the problem?
- Outcomes or Results are the last element of the problem solving chain.
- Tools for Assessing Outcomes /Results.

7.1 Tool 1 - Tell no lies claim no easy victories!

- It is important for problem-solving leaders to be honest when assessing results.
- Sometimes people lie or exaggerate their successes or results.

Plenary Group Exercise

Example: A co-operative board succeeds in acquiring a new machine to increase production. While this is a great success, it is not enough. The co-operative still has to ensure that the worker owners are trained to use the machine and that it fits into overall policy like insurance, safety and security. Sometimes simply acquiring equipment is used by leaders to create the impression that everything is running smoothly when the other necessary steps have not been attended to.

The facilitator asks these questions to probe and lead a loose discussion.

Exercise: Can you think of examples like this?

Question: Why do people lie or claim easy victories?

Question: What are the consequences of lying or exaggerating success for building the co-operative movement?

7.2 Tool 2 - Self and Mutual Criticism

- It is important to get feedback on one's performance after trying to solve a problem.

- Feedback is either given or received.

Plenary Group Exercise

The facilitator asks the following questions and leads discussion.

Question: Why is it important to get feedback on how a person performed in trying to solve a problem?

Question: How should feedback be given?

Question: How should feedback be received?

7.3 Tool 3 - Evaluation

Evaluation and leaning are both crucial to a dynamic and sustainable process of change. A thorough and ongoing process of evaluation, analysis and reflection, which captures the learning from our actions and informs the direction we take, will make us increasingly effective as we struggle towards our vision.

Group Based Exercise -Evaluation Tree

The facilitator draws the picture of a tree with people ‘playing’ on the tree in different spots. Some are hanging, others are climbing, one is standing at the bottom of the tree another is falling off a branch, etc. This tree symbolizes their work. They are asked where they are on this tree in terms of their work?

If one is unable to draw a tree, one can draw a tree in the sand or find a tree that the group can look at and then say to the group where they see themselves on the tree.

Important points to remember when evaluating:

1. To be **honest** when assessing results: ‘Tell No Lies Claim No Easy Victories.’
2. Get **feedback** on one’s performance after trying to solve a problem.
3. **Participatory** evaluation is beneficial to working in groups. All should agree on certain questions and then go through the process using the questions.
4. Evaluation is used to highlight **weaknesses** to further growth.

Module 8 – Evaluation of the Workshop Training

We have traveled a long way together. We have learned from each other and about each other. However, the learning process began before the workshop and will continue after the workshop through our common practice and commitment to problem-solving leadership training.

It is important for the workshop evaluation to bring together our collective experience and learning in this process so that we can further empower ourselves and those around us.

We have all grown in some small way in this process. Like a flower we have all blossomed a little and it is important for us to identify with this change – our collective experience, reflection, and practice.

It is time for “**criticism and self criticism.**”

8.1 Self Evaluation

The facilitator hands out a page to every participant and asks them to write responses to the questions below. The facilitator should take participants in an interactive way through the questions and assist with difficulties.

1. Has your understanding of problem-solving changed since the beginning of the training? What has caused it to change?
2. What have you learned about yourself which you did not know before the beginning of the training?
3. Do you think you own these ideas and tools for problem solving?
4. How did you experience the levels of support (were you listened to and so on) and challenge (learning, discussions and debates) in the group.
Support: high, medium, low, none
Challenge: high, medium, low, none
5. Reflecting on your experience of the training:
What has been more useful?
What has been less useful?
6. Do you have any comments to add?

8.2 Training Evaluation

The facilitator does this evaluation in plenary with the entire group. All responses to be recorded.

1. Which parts of the workshop did you like the most? Why?
2. Which parts of the workshop did you like the least? Why?
3. What suggestions do you have to improve the workshop?
4. What did you find most difficult?
5. What was the most important lesson you learnt?
6. What is the main obstacle you think you face in applying what you have learned?
7. What tools did you find useful in solving the problems of the co-operative?
8. Would you use the tools learned in your co-operative?
9. How would you use these tools?
10. Has the training enabled you to understand your role in your co-operative?
11. What kind of follow up do you think we need in order to strengthen the outcomes of this workshop?

8.3 Feedback from Trainers to Group

Since this guide is meant to be about a two-way learning process it is important for the facilitator to take stock of the learning s/he has achieved. It is through this process that the educator gets educated and builds knowledge.

The facilitators need to give feedback to the group based on what they have experienced throughout the training. This should be done in plenary.

- Have you met your objectives?
- Was there a sense of group development, did the participants value one another's inputs?
- Did your emotions change during the event?
- What did you learn?
- Were people asking questions? Were you challenged?
- Do you think that instructions and descriptions of exercises were clear enough for participants to understand?
- Did participants break the silence and start dialogues amongst themselves?
- If people kept bringing up the same issues, was it because they weren't following the process or because they were not being heard?
- Were you able to break down traditional power groups and promote those that were marginalised?
- Were you open to criticism?
- Was the training inclusive of everybody's needs and experiences?

While the participants are answering their evaluation questions individually, it is important that the trainers go through the above questions so as to give a thorough feedback/evaluation of the training, 'what it was like for them as trainers?' This should be done in order to emphasise to the group the 'two-way learning process' that has taken place throughout the training.]

Group Based Exercise: Frozen image

Each group should make a 'frozen image'/role play of how participants feel about the way forward. Have each group present their image to the large group. The rest of the participants have to guess what the image is telling us.

After the groups have presented their frozen image, the facilitators can present theirs.

The facilitator then guides a closing whereby thanks can be given and networking can take place amongst the participants (e.g., addresses, telephone numbers etc.).

So persevere, if necessary. For success attends only those who persevere, who see their goal steadily and aim for it unswervingly...who persevere with dedication and faith in the cause they are fighting for...

Ruth Heredia: The Amul India Story

Additional material

Gender Issues in a Co-operative

Introduction

The values of self-help, mutual responsibility, equality and equity are held in common by all co-operators. But even though co-operatives may have policies of equity and equal opportunities for both women and men, their practices may differ. True equality may not, in reality, exist. For example, although women contribute significantly to the agricultural sector and hence to the national economy of nearly all countries in the world, the percentage of women members in agricultural co-operatives, compared to men, is notably lower. Women's participation is also practically non-existent in co-operatives at decision-making levels.

In order to correct these imbalances and ensure the sustainability of co-operatives, it is necessary that gender issues are addressed.

Why is gender integration important?

- Active, equitable participation of members, both men and women, is a necessity for sustainable co-operative development. Active participation in the co-operative context means that members are involved in all the functions of a co-operative including planning, decision-making, implementation, and financial and management control.
- Co-operatives are based on the values of self-help, mutual responsibility, equality and equity. They practice honesty, openness and social responsibility in all their activities. In order to enhance the credibility of co-operatives as democratic people-based movements in the eyes of the public and co-operative members, co-operative values must be respected and adhered to.
- Co-operative principles state that co-operatives are democratic organizations without gender discrimination. But can they be regarded as truly democratic if women members do not have equal access to decision-making levels? If women are under-represented or not represented at all in decision-making, they may find it difficult to accept the legitimacy of decisions taken which do not take their interests into consideration.
- Experience has shown that women in leadership positions are more likely to address gender issues and safeguard the interests of women. As the co-operative movement worldwide incorporates so many women (yet few in management positions), it is important that more women are integrated into the system.

What are the benefits of gender integration?

- Women represent fifty per cent of the world's human resources. By enhancing **women's productive capabilities and developing their capacities, co-operatives will benefit from this hitherto under-utilized human resource.** Many women have special skills, for instance, in marketing and trading.

- Co-operatives will become a **stronger economic and more influential political force** if more women (the invisible workforce) are actively involved.
- **Men and women often tackle and solve problems differently.** In today's fast changing socio-economic and political climate, the need for innovative thinking and creative ideas is becoming exceedingly important especially for the co-operative sector. By involving more women in decision-shaping and decision-making, one will enhance the prospects of co-operatives, diversify activities and fortify the co-operative movement.
- In the case of agricultural co-operatives, **the involvement of more women in economic activities would result in a more integrated production of food crop and cash crops.** This would enhance food security and have a positive effect on the environment as intensive monoculture causes soil erosion and degradation.
- **Involving more women in co-operatives will broaden the scope of co-operatives and improve their social standing.** Women's and men's priority areas often differ. For example, women are often more concerned with social development issues which touch the everyday lives of women such as employment, health, the environment and children than men.
- Many examples have proven **that initiatives taken by women in co-operatives have accelerated the progress and change of their socio-economic situation.**

Some suggestions

- Through **awareness creation, gender sensitization, education and lobbying** co-operatives can help remove the obstacles to women's equal participation (e.g. membership criteria or legal, traditional, financial, and attitudinal constraints).
- Through **training and education programmes** which are sensitive to women needs, co-operatives can help strengthen women's capacities and capabilities, resulting in their increased self-confidence and enabling them to participate more fully in decision-making and assume leadership positions.
- Co-operatives can **consult and involve women when decisions are being taken, particularly those regarding women or which are in women's interests.**
- Co-operatives can **review their policies and plan periodically** to ensure that they are gender-sensitive? Co-operatives can focus on gender in their action plans.
- Co-operatives **can establish "gender committees" or units whose tasks, for example, can be to identify gender-related problems;** to ensure that gender awareness training programmes are carried out; to be responsible for gender analysis in programme planning etc. It should be noted here that by establishing a special unit or office for gender issues or programmes, one risks that the gender issue becomes a side-issue that has been "taken care of" and that women continue to be marginalized in mainstream activities. A gender unit must therefore be part of mainstream activities or have direct access to policy and decision-making levels.

- Co-operatives can use their **national organizations and networks** to collect gender data and help identify different types of projects focused on women's needs which can help them increase their income-earning capacities and alleviate their work loads. For example, they can investigate how much time men and women spend on various chores and activities and how this fits in with potential and economically viable and sustainable co-operative activities.

Note-taking

