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ZIMBABWE AGRICULTURAL COMPETITIVENESS PROGRAM

**SECOND QUARTERLY PROGRESS REPORT, YEAR THREE
(JAN–MAR 2013)**

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ZIMBABWE AGRICULTURAL COMPETITIVENESS PROGRAM

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ABBREVIATIONS

AFWG	Agriculture Finance Working Group
AGRIBANK	Agricultural Bank of Zimbabwe
AGRITEX	Agricultural Technical and Extension Services
AHIC	Animal Health Industry Council
AMA	Agricultural Marketing Authority of Zimbabwe
ARC	Agriculture Research Council
ASF	African Swine Fever
AU-IBAR	African Union Inter-African Bureau for Animal Resources
BSP	Business Service Providers
BDSPPS	Business Development Service Providers
CA	Commodity Association
CAADP	Comprehensive Africa Agricultural Development Program
CALR	Centre for Applied Legal Research
CBO	Community Based Organization
CBZ	Commercial Bank of Zimbabwe
CFU	Commercial Farmers Union
CGA	Cotton Ginners Association
CIBER	Competitiveness Impacts of Business Environment Reform
CIG	Commodity Industry Group
COMESA	Common Market for Eastern and Southern Africa
COMEZ	Commodity Exchange in Zimbabwe
COP	Chief of Party
COTR	Contracting Officer's Technical Representative
CNFA	Citizens Network for Foreign Affairs
CSDOC	Charles Stewart Day Old Chicks
CSO	Civil Society Organizations
CTC	Competition and Tariff Commission
CVSZ	Council for Veterinary Surgeons of Zimbabwe
CZI	Confederation of Zimbabwe Industries
DA	District Administrator
DAI	Development Alternatives Inc.
DCOP	Deputy Chief of Party
DOHOPA	Domboshawa Horticulture Producers Association
DR&SS	Department of Research & Specialist Services

DVS	Department of Veterinary Services
EMA	Environmental Management Agency
EMCOZ	Employers Confederation of Zimbabwe
EOI	Expression of Interest
FaaB	Farming as a Business
FaaFB	Farming as a Family Business
FACHIG	Farmers' Association for Community Self-Help Investment Groups
FANRPAN	Food, Agriculture and Natural Resources Policy Analysis Network
FAO	Food and Agriculture Organization
FBC	Financial Bank of Zimbabwe
FCPA	Federated Cotton Producers & Marketers Association
FMD	Foot and Mouth Disease
FTFMS	Feed the Future Monitoring System
FY	Financial Year
GALS	Gender Action Learning Systems
GIZ	Deutsche Gesellschaft für Internationale Zusammenarbeit (German Development Services)
GMAZ	Grain Millers Association of Zimbabwe
GMO	Genetically Modified Foods
GOZ	Government of Zimbabwe
HPC	Horticulture Promotion Council
IFPRI	International Food Policy Research
LAIFEZ	Leather and Allied Industries Federation of Zimbabwe
LFCE	Land Fortunes Commodity Exchange
LMAC	Livestock & Meat Advisory Council
LOE	Level of Effort
LOL	Land O' Lakes
LTTA	Long Term Technical Assistance
MABC	Matebeleland Agricultural Business Chamber
MAPA	Murehwa Agricultural Producers Association
MAMID	Ministry of Agriculture, Mechanization & Irrigation Development
M&E	Monitoring and Evaluation
MLA	Market Linkages Association
MLG	Ministry of Local Government
MPPA	Manicaland Poultry Producers Association
MoU	Memorandum of Understanding
MTP	Medium Term Plan
MWAGCD	Ministry of Women Affairs, Gender & Community Development

NACSCUZ	National Association of Cooperative Savings and Credit Unions of Zimbabwe
NADF	National Association of Dairy Farmers
NCD	New Castle Disease
NGO	Non Governmental Organization
NPPA	National Potato Producers Association
NUST	National University of Science & Technology
OIE	World Organization on Animal Health
PAPST	Public Affairs & Parliamentary Support Trust
PIB	Pig Industry Board
PMP	Project Monitoring Plan
PO	Purchase Order
POL	Point of Lay
PPAZ	Pig Producers Association
RIA	Regulatory Impact Analysis
RDC	Rural District Councils
SADC	Southern Africa Development Community
SAPST	Southern Africa Parliamentary Support Trust
SATH	SADC - Trade Hub
SAZ	Standards Association of Zimbabwe
SHDF	Self Help Development Foundation
SI	Statutory Instrument
SIRDC	Scientific and Industrial Research and Development Centre
SMA	Stockfeed Manufacturers Association
STTA	Short Term Technical Assistance
TAMIS	Technical and Administrative Management Information System
TA	Technical assistance
TFC	Trade Finance Capital
ToT	Training of trainers
TWG	Technical Working Groups
USAID	United States Agency for International Development
USG	United States Government
UZ	University of Zimbabwe
WABAZ	Women's Alliance for Business Associations in Zimbabwe
WAM	Weekly Activities Meeting
WILSA	Women and Law in Southern Africa
ZAA	Zimbabwe Abattoirs Association
ZAGS	Zimbabwe Animal and Grasslands Society
ZADT	Zimbabwe Agricultural Development Trust

ZAMFI	Zimbabwe Association of Micro-Finance Institutions
ZCFU	Zimbabwe Commercial Farmers Union
ZCTS	Zimbabwe Cattle Traceability Scheme
ZEPARU	Zimbabwe Economic Policy Analysis and Research Unit
ZESA	Zimbabwe Electricity Supply Authority
ZETDRA	Zimbabwe Electricity Transmission & Distribution Regulatory Authority
ZFU	Zimbabwe Farmers Union
ZNCC	Zimbabwe National Chamber of Commerce
ZNFU	Zimbabwe National Farmers' Union
ZIM-ACP	Zimbabwe Agricultural Competitiveness Program
ZIM AIED	Zimbabwe Agricultural Income and Employment Development Program
ZINWA	Zimbabwe National Water Authority
ZNCC	Zimbabwe National Chamber of Commerce
ZPA	Zimbabwe Poultry Association
ZVA	Zimbabwe Veterinary Association
ZWPFT	Zimbabwe Women Poultry & Small Stock Farmers Trust
ZWLA	Zimbabwe Women Lawyers Association
ZWRCN	Zimbabwe Women's Resource Centre and Network

CHAPTER 1: ZIM ACP IN BRIEF

Zim ACP is designed to provide support to the farming and agribusiness sector, via representative farmer bodies by enabling the business environment and subsequent economic growth and employment. It aims to do so via three interlocked components:

- **Component 1**- supporting and strengthening representative farmers unions, commodity associations and agribusiness associations and assisting them to develop their analytical and advocacy capacity,
- **Component 2** - increasing the efficiencies in agricultural markets, developing and applying improved technologies and enhancing the capacity of market institutions; and
- **Component 3** - enhancing the capacity of business service providers to deliver quality, demand-driven trainings and technical assistance at a firm and farmer level.

From January 1 through March 31, 2013, Zim ACP finished the second quarter of year three and is making strides toward achieving the project deliverables particularly in Components 1 and 3. While Component 2 continues to present challenges, progress was made and plans are underway to continue this trend in the next two quarters which will put us on target to achieve, if not exceed, our PMP goals in this area too.

What has emerged over the past quarter is a course toward converging all three components more cohesively to deliver greater results in all three areas - representative bodies, market infrastructure, and skills. We intend to continue to build this into next year's annual work plan. The team has already started this convergence strategy and is integrating union / association strengthening, market infrastructure improvement (standards), and skills training and activities.

1.1 QUARTERLY HIGHLIGHTS:

- ITC/SAZ/Zim ACP provided training on market strategy and voluntary standards, which was extremely well received and will continue with more joint trainings next quarter.
- Zim ACP offered technical assistance on membership database, website and services development for unions and associations. This assistance is designed to show the value added of belonging to the unions and associations and to encourage greater management and augmentation of membership rolls while offering services that increase industry production.
- Farming as a Family Business and the Gender Mainstreaming manuals were approved by USAID and will be used for training gender specialists in farmer unions and commodity and agribusiness associations.
- Zim ACP's mentoring of LMAC's ongoing advocacy and lobbying efforts demonstrated the importance of evidence-based advocacy and the economic impact of proposed regulations on the livestock industry.

1.2 RESULTS INDICATORS:

Zim ACP performed well against its indicator targets as shown in the Table below. Out of 17 targets the project outperformed in seven and made appropriate progress given the circumstances against the rest of our targets.

TABLE 1 - INDICATORS, TARGETS AND PERFORMANCE

Indicator Summary	Year 3 Target		Actual for Quarter 2		Cumulative to date		Comment on indicator achievement to date
4.5.2-43 Number of firms (excluding farms) or Civil Society Organizations (CSOs) engaged in agricultural and food security-related manufacturing and services now operating more profitably (at or above cost) because of USG assistance	410		120		201		Target should be met as more firms will start reporting on impact in Q3 and Q4
ACP 1 Value of resources leveraged through partnerships with agribusinesses, agribusiness service providers, NGOs etc	\$150,000		\$195,463		\$349,209		Annual target surpassed because of a significant and unanticipated windfall to ZFU during Q1
ACP 2 Improvement in services to members by representative bodies of farmers, commodity associations and agribusiness organizations (as measured by increase in new members and retention of current members)	276,000		1,066		6,979		Achievement very small for the two quarters. Producer associations expect members to renew their subscriptions in numbers after harvest and sale of the dryland crop in Q3
ACP 3 Increase in client coverage and/or customer outreach of supported market facilitation institutions /organizations	625		0		0		Work has been planned for coming quarters
4.5.2-42 Number of private enterprises, producer organizations, water users' associations, women's groups, trade and business associations and community-based organizations that applied new technologies or management practices as a result of USG assistance	50		10		17		Achievement small for the two quarters. Expect accelerated adoption in coming quarters as support to training institutions and firms gets underway
ACP 4 Number of market facilitation institutions/ organizations that, as a result of USG assistance, are in each of the following 3 stages. Stage 1: Undergoing capacity/competency assessment. Stage 2: Undertaking capacity/competency strengthening. Stage 3: Making significant improvements	Stage 1	4	Stage 1	0	Stage 1	0	Work has been planned for coming quarter
	Stage 2	3	Stage 2	1	Stage 2	1	Expect to meet the set target
	Stage 3	3	Stage 3	0	Stage 3	0	Work with SAZ and standard has been planned for coming quarters
4. 5.1-24 Number of Policies/Regulations/ Administrative Procedures in each of the following stages of development as a result of USG assistance in each case: Stage 1: Analyzed Stage 2: Drafted and presented for public/stakeholder consultation	Stage 1	20	Stage 1	2	Stage 1	7	Expect to meet the set target
	Stage 2	12	Stage 2	4	Stage 2	8	Significant achievement for the quarter. Expect to meet the set target
	Stage 3	8	Stage 3	4	Stage 3	8	Significant achievement for the quarter. Annual target already met.
	Stage	3	Stage	0	Stage	0	No significant achievement for the quarter. Expect some of

Indicator Summary	Year 3 Target		Actual for Quarter 2		Cumulative to date		Comment on indicator achievement to date
Stage 3: Presented for legislation/decreed Stage 4: Passed/approved Stage 5: Passed for which implementation has begun	4		4		4		the regulations currently in stage three to move to stage four in coming quarters
	Stage 5	4	Stage 5	0	Stage 5	0	No significant achievement for the quarter
ACP 5 Representative bodies of farmers and agribusinesses and commodity associations effectively advocating in public forums and Parliamentary committee meetings	85		14		66		Remarkable achievement for the quarter. The set annual target will be met.
4.5.2-7 Number of individuals who have received USG supported short-term agricultural sector productivity or food security training	120		24		122		Remarkable achievement for the quarter. The set target has been surpassed.
4.5.2-11 Number of food security private enterprises (for profit), producers organizations, water users' associations, women's groups, trade and business associations, and community-based organizations (CBOs) receiving USG assistance	50		13		25		Achievement small even for the first quarter. Expect accelerated adoption in coming quarters as support to training institutions and firms gets underway
4.5.2-37 Number of micro, small and medium enterprises receiving business development services from USG assisted sources	4,000		700		1,183		Achievement small for the two quarters. Expect the number of businesses receiving business development services to increase in coming quarters following the adoption of recommendations from the services identification consultancy work done in quarter 2.

CHAPTER 2: PROJECT ACTIVITIES

2.1 COMPONENT 1: ORGANIZATIONAL AND ADVOCACY COMPETENCE IN FARMER REPRESENTATIVE BODIES

2.1.1 ORGANIZATIONAL COMPETENCE

ZFU & ZCFU

Zim ACP continues to work most intensively with ZFU and ZCFU on organizational capacity building. We have seen the best results with ZCFU, which is trying to gain more financial stability, and is essentially restructuring itself with Zim ACP's help. ZFU on the other hand has not started to implement action plans that Zim ACP developed with them. Their interest lies more with receiving funds to do their own activities. Furthermore, it has not interacted much as a joint lobbyist with other unions and associations. Nonetheless, due to its membership volume (5,000 active and 200,000 inactive), ZFU is an essential partner.

Database, Website, Services STTA

During the quarter Zim ACP provided capacity-building support in the area of membership management and services. Four STTA consultants provided assessments on membership services and website development and membership database development and utilization. The partners included in this technical assistance were ZFU, ZCFU, LMAC, HPC, DOHOPA and MAPA. This work will continue over the coming months to build on momentum started with these STTA on the development of the databases and individualized service packages that the unions and associations should offer. The databases and the services are crucial for these organizations to increase paying membership numbers and offering services of value. Consultant draft reports are attached as Annex 1.

DOHOPA

Zim-ACP assisted DOHOPA leadership in negotiating with Micro-King to finance horticulture production for members not intending to diversify into poultry production. The Micro-King team assessed the FaaFB training done by the DOHOPA positively, making them more productive and competitive in the horticulture markets. As result DOHOPA farmers qualified for Micro-King's group lending scheme based on five members teaming up and undergoing training on group dynamics and co-guarantor processes. An individual farmer can now qualify for a loan of up to \$1,500, which is payable over six months. As the financial scheme requires DOHOPA to source a reliable market for their produce, with Zim ACP technical guidance, DOHOPA leaders successfully negotiated a supply contract agreement for DOHOPA farmers with Muchero Africa, a local wholesale horticulture buyer.

2.1.2 ADVOCACY COMPETENCE

MOU Signed

ZimACP and Matebeleland Agricultural Business Chamber (MABC) signed a MOU for collaboration this quarter. MABC evolved from the Matabeleland Livestock Taskforce instituted following the AFWG

supported Livestock Financing Symposium in September 2011. On January 17, 2013 MABC trustees adopted the draft Deed of Trust document prepared by the Zim ACP legal team and registered the Deed of Trust with the Ministry of Social Welfare. MABC is a key stakeholder in lobbying and advocating for regulatory reforms in the livestock sector and is using Zim ACP supported evidence based studies and RIAs in the Matabeleland region.

Cattle and Abattoir Advocacy

Zim ACP's advocacy strengthening efforts saw a high degree of qualitative and quantitative results this quarter. While getting ZFU and ZCFU to cooperate and focus on industry perspectives of our CIGs has been difficult, two issues occurred this quarter that exemplified how joint collaborative lobby efforts on a CIG or industry basis can be beneficial for all in the future.

The first issue was raised at the Rural District Council level with regard to a by-law to charge a levy of over 11.5% on cattle traded and the second issue was an AMA proposed Statutory Instrument (SI) on Abattoir and Buyers registration fees. Zim ACP's support focused on preparing the unions and associations for public-private dialogue (PPD) regarding the new tax, fees and lobbying. Zim ACP provided a cost-benefit analysis of AMA's proposed poultry industry statutory instrument that indicated the high cost of time and money, as can be seen in Annex 2. The AMA instrument would require abattoirs and buyers to register at the cost of \$1,000 per annum. The AMA held a meeting with the private sector to discuss the SI and armed with the facts, the unions and associations strongly argued against the proposal.

While the jury is still out on the forms in which these SI will be endorsed, the pendulum has swung to the side of the private sector in exercising its collective voice – backed by their thousands of farmers, as a partner to government in determining decisions that will affect them. To further strengthen their lobbying power, at a Union Presidents Council meeting, both organizations decided to start collaborating with commodity associations for policy and regulatory reform.

Joint Agricultural Forum (JAF) Advanced

The movements towards coalitions and collaboration to address agricultural policy issues in the Quarter, outlined above, demonstrated to the partner organizations the potential role and importance of a joint platform for advocacy and lobbying. This facilitated the partners' appreciation of the objectives of the STTA on Feasibility Assessment of Establishing an Apex Public-Private Sector Agriculture Policy Dialogue Forum for Improving Productivity and Competitiveness in Zimbabwe's Agribusiness Sector started during the quarter. Initial reports indicate interest and support for the idea by various stakeholders. However, there were pockets of misgiving among established farmers' organizations as they consider that there were adequate policy dialogue platforms in the country. These include the Joint Presidents' Council of the four farmers' unions, the Agriculture Working Group of the Business Council of Zimbabwe (BCZ) and the Technical Working Group on Agriculture of the National Economic Consultative Committee, a public-private sector platform coordinated in the President's office. The JAF consultant presented the scope of the study at the meeting of the Joint Presidents' Council hosted by Zim-ACP on March 28, 2013.

Farmers' Forum

Zim-ACP made a presentation at the Farmers' Forum in Lupane District in Matabeleland North Province on February 20, 2013. The ZFU President was the guest of honor. Zim ACP's presentation focused on the need for farmers to be aware of issues and factors determining agricultural competitiveness at national and local levels for advocacy to improve the business environment for the farming sector. The presentation highlighted the example of the proposed RDC regulations on cattle buyers' levy. The farmers

and their local leaders were urged to come up with well-analyzed evidence in support of their advocacy and lobbying efforts.

APAHA & FSA

Additionally this quarter, the Animal and Plant Health Act and the Foods Safety Act regulatory reform made significant progress. The Centre for Applied Legal Research (CALR) and a US consultant, hired by Zim ACP, were able to finish the white paper drafts and the Regulatory Impact Assessment (RIA). The white paper drafts were verified by both private and public sector (DVS) veterinarians this quarter and are ready for submission to the MAMID (Ministry of Agriculture, Mechanization, and Irrigation Development). This process is a valuable learning experience for private sector actors (LMAC and affiliate associations, consultants, unions) who play vital roles in future discussions with the government on new acts or reforming of old ones.

Grain Commodity Industry Advocacy

Zim ACP working with key private sector representative bodies in the grain sector - the Grain Millers' Association of Zimbabwe (GMAZ), Bakers' Associations (BA), Stock-feed Manufacturers' Association (SMA), Grain Traders' Association (GTA) and the grain producers associations of ZCFU, ZFC and CFU - who are working to streamline advocacy and lobbying efforts. Zim-ACP supported a representative of the Grain CIG, the Vice-Chairperson of GMAZ, to attend the Regional Grain Industry Stakeholders' Consultative Forum. This was organized by the Eastern Africa Grain Council (EAGC) and the Alliance for Commodity Trade in Eastern and Southern Africa (COMESA-ACTESA) on March 11-12, 2013 in Lusaka, Zambia. The forum brought together private sector grain stakeholders as a first step towards building a Southern Africa network at both national and cross border levels. It provided a platform for dialogue, collaboration and was a step towards harmonization of policies within countries and across the region.

GMAZ's participation exposed them to the need to build national coalitions to strengthen capacity to lobby and advocate for national policy dialogue. It created a better understanding of regional policy decision processes, advocating cohesion of policies amongst the players themselves for an improved business climate. In particular, the Zimbabwe participants recognized the importance of forming alliances with other stakeholders in the region for increased trade and regional integration.

2.2 COMPONENT 2: FACILITATING MARKET INFRASTRUCTURE IMPROVEMENTS

SAZ AND STANDARDS

Getting agricultural producers to meet demand standards has been one of the biggest barriers to market access for Zimbabwe's small commercial farmers. Without adherence to standards, procedures, and good business practices, small commercial farmers will remain non-competitive. Zim ACP is supporting the Standards Association of Zimbabwe (SAZ) to support the implementation of agricultural standards. In cooperation with SAZ and the ITC (International Trade Centre) of Geneva, Zim ACP facilitated the first session of a course on identifying markets and voluntary standards. This training complimented the study Zim ACP did last quarter on the demand in selected horticultural markets in South Africa and supermarkets in Zimbabwe. In addition to price and quantity, the study rated markets by standards on SPS compliance, packing, handling, and delivery times. It was used in the first module of the ITC training, at which 24 participants (15 male, 9 female) were trained. The course will be given in three successive two

and three day modules over the next three to five months. The course proved popular, was fully subscribed and a second session will start late May. Attendees for the first session included farmer unions, agricultural projects, exporters and trainers. The next session will be opened further to include produce exporters.

ANIMAL TRACEABILITY

In an effort to improve Zimbabwe's beef industry, Zim ACP is supporting the marking or tagging of animals. The project began working with the Livestock Identification Trust (LIT), which was established in 1999 and tasked with registering animals in order to meet international requirements for traceability of meat and other animal products on the export markets. They are working on getting LIT much needed financing in order to revitalize and reestablish their very important work (as shown in Annex 3).

THE AGRICULTURAL FINANCE WORKING GROUP

In this quarter, Zim ACP supported AFWG in its work with XDS, farmers' unions and two banks to pilot a credit rating project as part of the awareness and capacity building program. The pilot will make use of the membership databases under development by Zim ACP. Implementation of the pilot will be based on availability of funding for the implementation.

POULTRY STANDARDS AND BRANDING

Zim ACP, in collaboration with Zim-Trade, ZPA and LMAC, is working on the standards for broilers produced by small, mainly woman-owned, enterprises. The SAZ will take a role in this as well. Success in this is required before moving on to a branding program for domestic and regional trade. Zim ACP assisted ZPA and Zim-Trade in developing a funding proposal to bring Zimbabwe poultry standards up to international standards. The proposal is under review by the European Union (EU) funded ACP/AU Commodity Development Enterprise (CDE). If funded, ZPA will receive €26,600 to implement the marketing branding strategy with Technoserve's assistance. ZPA will collaborate with SAZ on this initiative (as shown in Annex 4).

2.3 COMPONENT 3: IMPROVING AGRO-BUSINESS DEVELOPMENT SERVICES, AGRO-BUSINESS SKILLS AND AGRO-PRODUCTION AND PRODUCTIVITY

STANDARDS TRAINING

As described under Component 2, the ITC training delivered in cooperation with SAZ and Zim ACP provided a course on Market Analysis and Private Voluntary standards to the Livestock & Meat and Horticulture CIGs. This is a three-segment course over three days; each segment is aimed at enhancing the trade analysis capacity and awareness of private companies on voluntary standards related to the Zimbabwean Horticulture and Livestock sectors. Specifically, the course focuses on developing the capacity of SAZ, HPC, LMAC, farmer unions and associations, private sector training institutions and independent consultants to offer trainings on standards, hence improving the uptake of standards in the agriculture and agribusiness sectors. The course has been planned for two groups of 30 participants over the period March to September 2013. Participants are independent trainers, consultants, exporters, union and association executives, SAZ and Zim ACP staff.

TOT FOLLOW UP

As part of a process to improve the quality standards of training services, Zim ACP conducted a capacity assessment of private training institutions they accredited in the first and second year of the project. The objective was of identify gaps between the services offered by the institutions against current and projected market demand. The project was also interested in seeing the effectiveness of their trained BSPs and to ensure that private sector providers can be relied upon for effective delivery of training services to agribusiness enterprises. Results indicated that 700 people were trained this quarter by the accredited BSP, 54% being women. Not only does this demonstrate sustainability of previous technical assistance, but also going forward these institutions will have the capacity to deliver business and quality standards trainings to unions and associations. Fourteen private training institutions across the provinces were identified; these will be strengthened to collaborate with farmer unions and associations.

FAAFB

During the quarter our Farming as a Family Business manual was approved by USAID. This manual has a strong gender focus, and we will promote it as the USAID flagship farming as a family business training manual. Zim ACP certified trainers will train on it, at cost, in May 2013. In pursuit of expanding geographic reach in skills training, the Zim ACP training coordinator interviewed eleven additional trainers/private training companies around the country, who are invited to participate in a ToT on the manual.

Gender

During the quarter our Gender Mainstreaming manual was approved by USAID. This manual will be used during training of gender focal persons in farmer unions and commodity and agribusiness associations. The manual will also be available for use by various organizations aiming at promoting gender awareness and gender equality in their operations. In addition, Zim ACP plans on providing gender awareness training in farmer unions commodity and agribusiness associations targeted at ward, district and provincial leadership next quarter. This is expected to increase participation and contribution of women in the leadership hierarchy (ward, district, province and national levels) of the farmers' unions, commodity associations and agribusiness organization.

CHAPTER 3: ACTIVITIES UNDER M&E

All program events organised by Zim ACP during the reporting period were monitored. These included stakeholder consultation forums, meetings, workshops and training sessions. All event participants completed an attendance register and an evaluation questionnaire was completed when applicable. The attendance register captures details of participants such as name, sex, organization and contact details. This record allowed for tracking of the number and type of stakeholders participating. Analysis of this record allowed program management to take corrective action when some key groups or sectors (women, small scale producers, industry representatives etc.) were underrepresented from events. An evaluation questionnaire is administered to get feedback from participants on the content, organisation and facilitation of the event. The data collected during event monitoring is entered in TAMIS together with a brief report giving a summary of the event and results achieved. The TAMIS meeting reports are a valuable resource during the writing of quarterly and annual progress reports. Data from the evaluation questionnaires is collated and used to produce an evaluation report for management feedback on the successes and lessons learned from events as well as for planning future events. See Annex 5 for Event Evaluation Reports.

3.1 ADOPTION OF LEARNED MANAGEMENT PRACTICES

An assessment - to establish the number of supported business enterprises and producer organizations applying learned management practices during the reporting period - was restricted to union, commodity and agribusiness associations. No non-farm business enterprises received assistance from Zim ACP during the reporting period. Of the 10 producer organizations that received assistance during the reporting period, all of them applied the learned management practices. Organizations such as ZFU, ZCFU, ZWPFT, MABC and LMAC used the evidence gathered with ACP assistance as well as tips on how to deliver effective messages during discussions with authorities on AMA statutory instruments on poultry and poultry products development as well as on a proposed local government levies on livestock sales.

3.2 IMPACT STUDIES

Program impact assessments captured long-term changes at producer organizations as well as impacts at the business enterprise level. The logic is that when producer organizations and business enterprises benefit from improved and relevant services provision as well as an improved regulatory and market infrastructure, long-term positive changes will occur in two dimensions:

- Increased profitability of business enterprises and improved financial performance of producer organizations (ability to cover their operating costs);
- Ability of producer organizations and business enterprises to leverage resources through partnerships.

3.3 PROFITABILITY

Zim ACP has a FY 2013 target of 410 supported business enterprises, (excluding farms), and producer organizations operating more profitably (at or above cost) because of USG assistance. For this report, profitability was assessed on 10 producer organizations and a total of 173 non-farm business enterprises

involved in input supply, selling horticultural produce and agro-processing. These business enterprises received Zim-ACP supported business training aimed at increasing their profitability or viability between August 2011 and August 2012.

A survey conducted on the 173 business enterprises by trained enumerators with the aid of a short questionnaire, (also Annex 5) found that of the 173 business enterprises that received business training, 75 that were loss-making (before the training) are now operating profitably, 45 that were operating profitably before the business training are still operating profitably, 22 business enterprises are still loss-making at least six months after receiving training while 31 that were operating profitably before the business training are now operating at a loss. Generally, the trend is that of good performance by most supported business enterprises. Of the 10 producer organizations that Zim ACP is working with, none is able to fully cover its operating costs yet. Established organizations such as ZFU, ZCFU and FACHIG are still struggling to meet salary expenses of their employees. Unfortunately, broken down equipment such as photocopiers has gone unrepaired, while payments for basic information and communication services such as internet and email have been allowed to lapse. LMAC and HPC are receiving support from Zim ACP in the form of salaries for core staff, while small organizations such as DOHOPA and MAPA are yet to establish offices from which to run association business. In the next quarter Zim-ACP will assist producer organizations deliver demanded services on a commercial basis to members and non-members, to generate income, hence contributing to the financial stability of each organization. Development of an organizational website, also planned for next quarter, will also help towards financial stability of the organizations through advertising revenue.

3.4 ASSESS VALUE OF RESOURCES LEVERAGED THROUGH PARTNERSHIPS

During the reporting period Zim ACP tracked the level of resources leveraged by partner institutions and supported business enterprises through relationships with agribusinesses, agribusiness service providers, NGOs etc. This is a project impact indicator looking at the ability of a producer organisation or business enterprise to attract resources (credit or grant) as a result of working with Zim ACP. The data for this indicator was collected from the 10 producer organizations that Zim ACP is working with, (ZFU, ZCFU, FACHIG, ZWPFT, LMAC, ZAA, ZPA, PPAZ, HPC, DOHOPA, MAPA, MABC, Coffee Growers Association), as well as 9,472 business enterprises (including farms) that received Zim ACP support in March and/or since August 2012. At the time of the assessment, in April 2013, at least six months had elapsed since the businesses received the training. A survey was conducted on the 9,472 business enterprises by trained enumerators with the aid of a short questionnaire (Annex 5). Forty two percent of the interviews were returned. The value of resources reported as leveraged in the last quarter is \$195,463. Types of resources leveraged by business enterprises include agricultural inputs and credit funds. Sources of resources leveraged by business enterprises include input suppliers, financial institutions, NGOs and individuals. The 2013 target for value of resources leveraged through partnerships was \$150,000.

CHAPTER 4: ENVIRONMENTAL ISSUES

During the reporting period, ZimACP ensured that terms of reference for consultants engaged to do policy and regulatory review included conducting technical, economic, social, legal and environmental impact analysis of the proposed reforms. Technical managers for the commissioned studies ensured that this was adhered to before accepting studies as completed.

In line with its Environmental Mitigation and Monitoring Plan, Zim ACP ensured that environmental issues were included in the analysis policies and regulations during the reporting period. The Fertilizers and Farm Remedies Act as well as the AMA Proposed Poultry and Poultry Products Development Regulations were analysis for environmental impact to ensure that proposed reforms did not have adverse impacts on the environment.

ZimACP's work plan includes activities to create awareness on environmental issues to leadership and management of unions, commodity associations and agribusiness organizations. This is aimed at encouraging producer organizations to take responsibility for preserving the environment (soil, water, vegetation, air, wildlife etc.) for current and future generations.

CHAPTER 5: GENDER ISSUES

Zim ACP is committed to mainstreaming gender to contribute towards gender equality and efficient use of human resources in Zimbabwe's agriculture private sector. Zim ACP recognizes gender equality as a fundamental human right and key to effective and sustainable economic development. The Zim ACP Project aims to contribute towards gender equality encouraging the involvement of both men and women in the program at various levels; as participants in training courses, meetings, workshops and discussion forums; and as presenters, facilitators or researchers. Zim ACP records shows that about 32 percent of participants in workshops organized during Quarter Two were women. Zim ACP will therefore continue making an effort to increase women's participation in workshops and stakeholder consultations.

In inviting men and women to participate in events, Zim ACP worked closely with associations to ensure that they sent not only a balance of men and women to events, but both men and women who were able to articulate to their constituencies' issues addressed and report back on matters discussed.

Where rural men and women were invited to events, the vernacular used during the proceedings or training was customized to the participants' attending. This allowed both men and women to be heard and to learn no matter their varying circumstances and experiences.

An analysis of allocation of leadership positions in the structures of the producer organizations shows that females occupied only 26% of leadership positions. This proportion is very low considering that about 70% of producers are women. To redress the gender inequality in producer organizations, in Quarter Three, Zim ACP plans to conduct gender awareness training targeted at ward, district and provincial leadership.

As reported in Chapter 2, our Gender Mainstreaming manual was approved by USAID during the quarter. This manual will be used during training of gender focal persons in farmer unions and commodity and agribusiness associations. The manual will also be available for use by various organizations aiming at promoting gender awareness and gender equality in their operations. In addition, Zim ACP plans on providing gender awareness training in farmer unions and commodity and agribusiness associations targeted at ward, district and provincial leadership next quarter. This is expected to increase the participation and contribution of women in the leadership hierarchy (ward, district, province and national levels) of the farmers' unions, commodity associations and agribusiness organization.

CHAPTER 6: CHALLENGES

During the quarter, a number of departments and Ministries came up with different levies and charge targeting the farmer. In proposing these statutory instruments and or raising the payable fees, there has not been a coordinated approach by the Ministries. This has worked to the detriment of farmers. This is because the response by the farmers' unions to each proposed regulations have tended to be piecemeal and force the unions and farmers to invest substantial resources in lobby and advocacy on each piece of regulatory reform. As a result, Zim ACP is considering a proposed comprehensive cost of compliance study that would provide stakeholders with comprehensive evidence to use for their advocacy on all issues pertaining to the cost of regulations. This could reduce the time effort invested in piecemeal reaction.

In Matabeleland, the MABC has proven to be a vibrant advocacy and lobbying platform and has been very articulate on issues that affect livestock value chain players. This has brought dynamism in advocacy and lobbying, stimulating Government to pay attention to stakeholders. But established unions (ZCFU, ZFU and CFU) see them as competition. They have voiced concern that the advocacy and lobbying efforts could erode the effectiveness of the established unions. Further, they fear government may not pay attention to new associations thereby diluting the effectiveness of the advocacy. The challenge is in getting the unions to accept an industry approach. Zim ACP will be encouraging coordination and MOU among the parties for strengthening of alliances and coalitions.

Horticulture is high potential industry offering scope for increased participation of smallholder producers in the formal horticulture markets, both domestic and regional. However, HPC, as the industry representative body, has not risen to the leadership challenge. The challenge is that HPC has not been readily responsive to Zim ACP's technical assistance. These challenges will be addressed in the next quarter via the development targeted technical assistance to improve HPC's communications and membership networks. The hope is that a strengthened HPC can also offer DOHOPA and MAPA secretariat services and can be a platform for effective lobbying and advocacy, similarly to LMAC in the livestock and meat industry.

Access to finance remains a challenge even for these organizations receiving direct Zim ACP support. Assistance to DOHOPA and MAPA on access funding for either expansion of the current enterprises or for diversification has met with limited success. The organizations were linked to potential funders, including the Agri-trade facility. Despite DOHOPA and MAPA being well organized and having developed their business skills through the FaaFB trainings, the costs of finance arranged with BigApple for DOHOPA is still prohibitively high at 5% per month.

The policy and economic environment remains fluid as the country goes through economic and political transformations. The reactions and response of the Ministry of Agriculture to the transformation is therefore not predictable. This makes it difficult for stakeholders to maintain a pro-active stand on current issues. Energies are spent on being reactive. Zim ACP will work on preparing the stakeholders to be prepared for the changes.

Furthermore, the prevailing political-economic environment makes the establishment and revamping of new market institutions a great challenge. This is because the policy setting that would allow these

institutions to operate is not stable. The limited finance available from both the public and private does not allow for the needed investment. Nonetheless, through its work in policy advocacy and research-based evidence for policy or regulatory reform, Zim ACP has won the confidence of both the public and private sector representative bodies that allows it to precede with studies of market facilitation institutions such as WRS on quality standards. In the next quarter Zim ACP will work on identifying initiatives requiring low start-up investment.

CHAPTER 7: BUDGETARY



ANNEX 1: WEBSITE, DATABASE AND SERVICES ASSESSMENT REPORTS

AN ASSESSMENT OF WEBSITE DEVELOPMENT NEEDS AND USE FOR FARMERS' UNIONS AND ASSOCIATIONS

by

O'Dell Magwagwa

Website Development Consultant

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ACRONYMS

ZFU	Zimbabwe Farmers' Union
ZCFU	Zimbabwe Commercial Farmers' Union
ZWPFT	Zimbabwe Women Poultry Farmers' Trust
LMAC	Livestock and Meat Advisory Council
HPC	Horticultural Promotion Council
FACHIG	Federation of Association for Community Self-help Investment Groups
MAPA	Murehwa Agriculture Producers' Association
DOHOPA	Domboshawa Horticulture Producers' Associations

EXECUTIVE SUMMARY

Zimbabwe's economy of late was under life support and the production sector heavily inactive due to financial crises. Businesses entities depended on hand to mouth survival formulas.

Upon visiting and liaising with the various Farmers Unions/Associations representatives in Zimbabwe, we have concluded that upon availability of financial resources, there is need to improve their information communication platforms. It's unfortunate that some large Unions/Associations did not manage to develop websites for their operations due to economic challenges and had to prioritize the limited resources. Indications from the meetings done reveal that a website for each union is really a necessity for them but it is not by choice that they had failed to implement development.

Of all the 8 Unions/Associations, they know what they would want on a website. Some of the Unions have their website material for development ready i.e. content, logos, photos and relevant information. The initial step will be registering the domain for the Unions/Associations and place them under secure hosting packages which has guaranteed uptime. The developments will then follow and find a hosting place.

To this end, we conclude that the Unions/Associations urgently require websites as a communication platform and instill stakeholders and members confidence. This will enable the unions to operate effectively and boost the economy as information is easily available to anyone anywhere.

INTRODUCTION

A website generally represents the face of the organization to the outside world on the internet.

Stakeholders, clients and partners can easily access information from any corner of the world. An effective website is one that interacts with the relevant stakeholders and performs the function it is supposed to. There are basically two types of websites that are common in this day and age, the first being a static website and a dynamic website. Depending on the purpose of the website, they are all appropriate.

A static website is one that informs people of their presents and little or no changes are done with no huge interaction between the owner of the website and the user of the website. A dynamic website is one that interacts more with the user, as it allows the owner to get feedback from the users therefore easier to analyse and anticipate what service is in demand.

The website being the corporate identity of an organization it requires a greater input from the owners. The main strategy to the Farmers' Unions/Associations is to see how they envision their website to be and how they want it to interact with their primary audience. There is also need to consider the current trends in the industry then modify and implement the vision to have something that the Farmers' Unions/Associations will be happy with.

The strategy will be implemented through having initial visits to all Farmers' Unions/Associations and have intensive interaction in the development stages where various website prototypes will be created.

PART I: WEBSITE DEVELOPMENT AND USE FOR FARMERS' UNIONS AND ASSOCIATIONS

WHY IS IT IMPORTANT AND WHAT NEEDS TO BE CONSIDERED?

It has been noted that all organisations require a website for information dissemination, for a professional presence, 24/7 marketing tool, provide an efficient method of service provisions and it's no different for Farmers' Unions/Associations. With the number of stakeholders ranging from 200 members from DOHOPA to 190 000 members from ZFU, a website will be the most efficient, effective and certainly the cheapest method of information dissemination. Looking at other services provided like a LMAC newsletter and ZCFU magazine, the website will be the best place to market or even distribute the documents to their current and prospective members and also making them environmentally friendly. As for smaller associations such as MAPA, ZWPFT and DOHOPA; the need to be known of their existence is the major drive for them to have a website. This will then increase their membership and also potential for donor assistance.

Looking at LMAC and HPC, having an effective website would help them showcase how diverse they are and also disseminate the relevant information to the different member associations. This can reduce the use of the organisation's resources such as time to send notifications; time to answer frequently answered questions and paper resources. All these are important aspects of the use of a website for all farmer unions/association and would increase the effectiveness in relating with their members, potential members and other stakeholders.

What needs to be considered?

For creating an effective website an organisation can talk about the development section and running the website section. The two sections cater for creating the website with its features to the point where the website is viewed by all stakeholders. Find Appendix 1 for the questions that cover what we consider when creating a website.

Development Section

During the development section, we consider the use of the website by the organisation. Most of the farmer unions/associations have and view their websites as merely a static website which is only one way communication and has no interaction with the stakeholders. By having an interactive website, on its own it pulls members back to it and also provides feedback to the associations that they need in terms of service provisions.

The development section also takes into consideration the primary audience. Unlike CFU who are targeting advertisers either internal or external to their union with advertising space on their website, the farmer unions/associations are concentrating on their member organisations and how to provide a better communication platform.

During development section we consider computer literacy and how often they would want to update the website. This assists with tools to use when creating a website. Either the use of the HTML language which is faster in loading of pages but a bit difficult to update or a content management system which is easier to use but a bit slow in loading.

Other Development aspects to consider

- Navigations links to use;
- Images and content to use;
- Branding and color usage;
- Browser compatibility;
- Have I got permission to link with other peoples websites and
- Will we need to create other new pages on the website?

Running the Website Section

When running the website we talk about visibility on the internet. This involves the domain registration which ranges from \$20 to \$30 per annum and allows stakeholders to visit website by entering the name. The domain also identifies what the organization does. An example is .org means it's an organization, .co.zw means it company and .ac.zw means it's an academic institution.

The running of a website also includes hosting which ranges from \$60 - \$240 per annum depending on the hosting package and what the organization would want. The hosting of a

website is when the physical files of the website are kept on 24/7 internet accessible computer so that the website is viewed by everyone.

Other running a website section

- Registration of website on Google and other search engine;
- The number of website visits and which areas visiting the website the most;
- Uploading website updates and
- How fast the website hosting environment.

PART II: OVERALL FINDINGS

Through the various visits to the Farmers' Unions and Associations we got an idea of the position on the ground as to how the organisations are run and what IT resources and infrastructure they need(if any). Through the visits, the organizations have expressed their concerns of their current website and lack of one, which we will look at individually.

1. HORTICULTURAL PROMOTION COUNCIL

No website was developed.

Management at HPC indicated that the functionality expectation is to have a website developed which is interactive and able to show the latest updates on activities on the ground. The website has to incorporate the 5 associations, as they represent the backbone of the council. They need social networks, newsletters, login profile and photo gallery on the website as they try to disseminate information to members and stakeholders. They have requested for a better website developed and creation of corporate emails for communication purposes. Furthermore, they want a website they can update and upload new content material. A reliable service provider for hosting and training for website maintenance is also required.

Linkages to services offered currently or planned

HPC mainly supports and implement statutes for the association members. The current services they offer are:-

- Representing the various groups on horticultural platforms;
- Implementing statutes and monitoring delivery
- Facilitate agreements of association members with the government
- Facilitate training and workshops for members

However the website would assist them to:-

- The website will have the 5 association members profiles fully represented enabling stakeholders to easily access information of choice;
- Globally accessible platform to communicate and interact with your stakeholders;
- Increase the number of potential donors and chances to get loans as the institutions will gain confidence and

- Stakeholders can build confidence in your council activities.

Access to funds, IT Resources and Capacity

Indications are that Association members contribute funds as subscriptions to the council. They can even introduce a pro-rata figure website levy for members unless the association has its own website. As time goes by, they can also have advertising space on the website so as to generate income for the website to pay for itself.

For the IT Resources the organization does own computers and laptops as office machinery.

Observed/assessed Short comings

- There is need to register their domain www.hpc.org which is their choice, though at a cost; i.e. costing between \$20.00 to \$30.00 annually.
- There is need to host the domain and website though are costs are involved; i.e. costing \$9.00 monthly or \$108.00 per annually.
- Revisits to stations are required to get further additional information and collect material for the websites i.e. transport cost/mileage.

2. FACHIG

Fachig has a static website www.fachig.org developed by Berimark Investments in 2010.

Berimark is hosting the website and Fachig is paying about \$25.00 monthly for hosting fees. They do not have corporate emails supported by hosting platform. The website was never updated as the developers are nowhere to be found for the past one and half years. The website's functionality is too general not to their expectation and not serving purpose to the organization. They wish and need social networks, newsletters, login profile, updating regularly and photo gallery i.e. an interactive website is what they want and desire. The CEO has indicated that the current website is stale and they want a new outlook

The current information / material for developing a website is available.

Linkages to services offered currently or planned

FACHIG is a member based organization. The current services they offer are:-

- Representing the members on markets and giving market trends information plus advertising;
- Bulk procurement of inputs and capacity building;
- Link members with various government departments and
- Facilitate training and workshops for members.

However the website would assist them to:-

- Cheap and easy way of alerting the whole world about the existence of Fachig;
- Uploading training manuals from workshops so that all people can view the content especially if the workshop was only for one member to attend and
- Increase the number of potential donors and chances to get loans as the institutions will gain confidence.

Access to funds, IT Resources and Capacity

As the organization is a member based organization, members contribute funds as subscriptions. With time can also have advertising space on the website so as to generate income for the website to pay for itself.

For the IT Resources the organization does own computers and laptops as office machinery.

Observed/assessed Short comings

- There is need to register a new domain www.fachig.net which is of their choice, though at a cost i.e. between \$20.00 and \$30.00 annually.
- There is need to host the domain and website though costs are involved; i.e. \$9.00 monthly Or \$120.00 per annually.
- Revisits to stations are required to get further and additional information and collect material for the websites i.e. transport cost/mileage.

3. ZIMBABWE COMMERCIAL FARMERS UNION (ZCFU)

ZCFU has a website www.zcfu.org.zw developed by Hansole Investments in 2011.

Hansole is hosting the website and ZCFU is paying about \$60.00 monthly. They do not have emails supported by hosting platform. The website was never updated. It was developed at a time when the economy was still in its infant stage of recovering. Administration then at ZCFU

was facing high labour turnover and no one was trained or was responsible for the website till mid last year when they engaged an Information Officer. The major role of the officer was to administer the website and ensure that it serves the purpose of the organization.

They have built new content, new logos, new images, and they actually want an overhaul for the website, with a new domain name. Their wish is to have a website where other related organizations can advertise, have social networks, newsletters, login profile and photo gallery.

Management is keen to see a new website developed which is interactive and showing the current status of farming activities in the country. They want a website they can update and upload new content material in comparison to the one in place. A reliable service provider for hosting and training for website is also required. They are also in need of corporate emails to become professional.

Material for developing a new website is available.

Linkages to services offered currently or planned

ZCFU is basically divided into 2 wings, the farming and the secretariat wing. The current services they offer are:-

- Voice of the farmers to the government;
- Assist farmers in securing loans from banks;
- Facilitate in technical and professional services and
- Act as an information centre and also provides training for members.

However the website would assist them to:-

- Disseminating information to members;
- Cheap and easy way of alerting the whole world about your existence;
- Uploading training manuals from workshops so that all members can view the content especially if the workshop was only for one member to attend and
- Increase the number of potential donors and chances to get loans as the institution gain confidence.

Access to funds, IT Resources and Capacity

The organization has approximately 15 000 members and they are paying monthly subscriptions. As time goes by, they can also have advertising space on the website so as to generate income for the website to pay for itself.

For the IT Resources the organization does own computers and laptops. They are currently using Broadband as their internet service provider.

The capacity to maintain the website is high because of the potential to raise the capital for keeping the website online.

Observed/assessed Shortcomings

- There is need to register a new domain www.zcfu.org which is of their choice, though at a cost; i.e. between \$20.00 and \$30.00 annually.
- There is need to host the domain and website though costs are involved; i.e.\$9.00 monthly Or \$120.00 per annually.
- Revisits to stations are required to get further and additional information and collect material for the websites i.e. transport cost/mileage

4. ZIMBABWE FARMERS UNION (ZFU)

ZFU currently has no website but they do have a registered domain, www.zcfu.org.zw.

They have a domain supporting/hosting their webmail for the organization and being hosted by Ecoweb and they are paying about \$135.00 monthly (internet and email hosting with limited users). All the material for website development is available when needed and they are prepared to assist in any way to ensure the website is developed

General Comments and Findings:-

Management's expectation is to see a new website developed which is interactive and showing the latest updates on activities on the ground. They wish and need social networks, newsletters, login profile and a photo gallery. They have requested for a better website developed and need for rollover corporate emails for communication purposes. They want a website they can update and upload new content.

Linkages to services offered currently or planned

ZFU has a membership of about 190 000 paying monthly subscriptions and levies to the union.. The current services they offer are:-

- Organize farmers into manageable clubs;
- Assist in acquiring loans from loaning institutions such as banks;

- Facilitate in marketing efforts and capacity building and
- Facilitate training and workshops for members.

However the website would assist them to:-

- Information is easily accessible to members through the website as it might be costly to get together 190 000 members at one call;
- Good image to stake holders as they seek credit lines;
- Generation of revenue to the organization through banner ads from other companies on your website and
- Increase the number of potential donors and chances to get loans.

Access to funds, IT Resources and Capacity

As the organization has approximately 190 000 members the access of funds are there and they are able to pay the maintenance of the website; which is between \$80 and \$240 per annum required. With time they can also have advertising space on the website so as to generate income for the website to pay for itself.

For the IT Resources the organization does own computers in their offices.

The capacity to maintain the website is high cause of the potential to raise the capital for keeping the website online.

Observed/assessed Short comings

- Might need to register a new domain www.zfu.co.zw which is of their choice, though at a cost; i.e. between \$20.00 and \$30.00 annually;
- There is need to host the domain and website though costs are involved; i.e. \$9.00 monthly or \$120.00 per annually.
- Revisits to stations are required to get further and additional information and collect material for the websites i.e. transport cost/mileage.

5. DOHOPA

Currently Dohopa has no website but has shown interest on having one especially if they are to achieve their future objective of being an Association not only located in Domboshava but in the Makombe District and then in the inter Mashonaland East province.

Dohopa wants to have use of the website to increase their competitiveness through:-

- Efficient dissemination of information to members as events and meetings;
- To get their name out, so they can be known of their existence;
- To attract donors to the Association;
- To show case some of the work they are doing to attract more contract farmers and
- Provide platform to get documentation on how to improve farming methods.

Linkages to services offered currently or planned

Dohopa mainly provides physical and practical services which will be difficult to implement on the website. The current services they offer are:-

- look for donors of capital either money or farming inputs;
- Assist in acquiring loans from loaning institutions such as banks;
- Facilitate contract negotiations for members and
- Facilitate training and workshops for members.

However the website would assist them to:-

- Uploading training manuals from workshops so that all people can view the content especially if the workshop was only for one member to attend and
- Increase the number of potential donors and chances to get loans as the institution will be now known and the work they do as well, therefore reduced fear of the organization not being genuine.

Access to funds, IT Resources and Capacity

As the organization has approximately 200 to 500 members the access of funds is there to pay the maintenance of the website which is between \$80 and \$240 per annum. They can even introduce a \$1 website levy for members. With time they can also have advertising space on the website so as to generate income for the website to pay for itself.

For the IT Resources the organization does not own computers so they will have to rely on members who have their personal laptops. If this is not possible there have an option of going to a local internet café at Domboshava and do regular updates when need be.

The capacity to maintain the website is high because they have the potential to raise the capital for keeping the website online through their subscriptions. Based on the conversation we had with the DOHOPA executive, they expressed the presents of qualified computer literate members and would be able to take care of the regular updates.

Observed/assessed Short comings

The major aspect is lack of computer resources that can be called DOHOPA property. From my experience there should be a computer that is assigned to website updating because we might need to install some software to help edit images and this could slow down the computer if used for other processes. There should also have a designated internet access for the association as opposed to using the internet café, which might turn to be expensive because of the time it will take to update the website.

The association might also need training or a seminar of how to use the website effectively and efficiently. This would aid them in content selection and other functions to consider when updating the website.

6. LMAC

LMAC is the most organized association we visited amongst the 8. Currently LMAC doesn't as yet have a website. Based on the conversation we had they have an idea of what they want the website to do for them. The website should communicate with the different member organizations. The major aspect LMAC informed us they would want on the website are:

- To have a section which communicates with all individuals;
- To have a website with login section where members can get information and
- To have their newsletter and magazine they create.

Linkages to services offered currently or planned

LMAC is an association that offers the following main services to their members:-

- Secretariat service to the member associations;
- Provide statistics to Government;
- Lobbying through creating position papers;
- Statistical collection for member organization from livestock to grains;
- In charge of member databases and
- Coordinating different sections and member organizations.

LMAC is an organization that sees a website as the most important tool for them to have as now. This will make communication with their member organizations easier. The website will make distribution of the information they collect easier. With their vision to be a data center, the organization can go a long way.

Access to funds, IT Resources and Capacity

LMAC has shown by the infrastructure them that they have the capacity and access to funds so as to keep the website running. The infrastructures they have are:

- Laptops but might need to provide them with a dedicated machine for website updates.
- They already have internet and email access

LMAC has individuals who are computer literate and with a bit of training on how to update content they will be able to maintain the website.

Observed/assessed Shortcomings

When visiting LMAC the only concern is having a dedicated computer for website upload. They have the financial capacity and man power capacity to take care of the website.

7. MAPA

Similar to DOHOPA and LMCA, MAPA does not have a website but they seem to know how they would want the website to do for them. MAPA showed how they had a basic knowledge about what a website is and they also informed us of their major objective of increasing the competitiveness. From the conversation with them at their offices, they indicated that they want a website to increase their competitiveness:-

- To get their name out, so they can be known of their existence;

- To attract donors to the Association and
- To attract more contract farming contracts.

MAPA is hoping that the website would be able to assist them in solving the below problems:-

- Getting markets for the produce via the website;
- Get different organizations to come and offer training services that would help MAPA and
- To get donors who will provide inputs, transport to markets and irrigation equipment.

Linkages to services offered currently or planned

MAPA is an association that offers the following main services to their members:-

- Contract negotiations between their members and organizations;
- Assist in acquiring loans from banks;
- Acquiring training for members;
- Acquiring contract farming projects and
- To establish fruitful markets for members.

MAPA as a whole would like the website to aid them in achieving all the above services and make the organization competitive. Through the discussions we had with them it was apparent that the website will be aiding through being noticed in the industry so as to get donors, investors and markets to the members. This would make it easier and profitable for their association members.

Access to funds, IT Resources and Capacity

MAPA with 500 registered members have proven that they can be able to raise the cash to maintain the website. This is apparent by the projects they have already implemented in Murehwa such as building a clinic and in process of building their offices. Therefore raising the \$80 to \$240 for maintaining the website will be easier for them.

For the IT Resources the organization does not own computers and the members also don't have computers to use for updating the website. It would be very important for them to have

computers specifically for website updates. The Association also doesn't have internet access so they will need to be supplied with a source.

The capacity to maintain the website is high cause of the potential to raise the capital for keeping the website online through their subscriptions. When we were at the meeting we managed to obtain someone who has the capacity to handle the uploading of content on the website. The lady has ICDL training with lotus 123 knowledge.

Observed/assessed Short comings

When we visited MAPA in Murehwa my major concerns are:-

- The building they use for meeting and office didn't have electricity for charging a computer if they were to be provided with one;
- The network was a bit bad so internet access will be bad not knowing at night how fast it will be and
- The members don't have computers or smart phones to access the internet, therefore the website will be more for the investors and donors rather than members to get news, notices and updates

The association might also need training or a seminar of how to use the website effectively and efficiently. This would aid them in content selection and other functions to consider when updating the website.

8. ZWPFT

ZWPFT is currently having their website developed but due to cash constraints they were unable to complete the payment of the development costs, therefore the website was suspended before the official launch. The total cost for the website was pegged at \$1200 and they were only able to pay \$200. With the conversations I had with the developer I was able to come out with the following issues:-

- For disseminating information to prospective and current members;
- For information about ZWPFT;
- For general events and news updates and
- For contact information of ZWPFT.

The website is doing what the ZWPFT wants it to do but I believe some functions and services can be added to make the website more interactive. Such function could be a mobile website. The major problem and service ZWPFT is trying to improve is obtaining market for their members. From the conversation we had with ZWPFT they mainly started the organization due to the lack of markets for poultry. The idea is by collective bargaining they would be able to get fruitful markets for their members.

Linkages to services offered currently or planned

ZWPFT is an association that offers the following services to their members:-

- To provide and establish fruitful markets for members;
- Contract negotiations between their members and other organizations;
- Training for members and
- Advocacy for members.

ZWPFT would want to the website to provide the following functions to aid:-

- Dissemination of information to the members;
- To look for fruitful markets for their members;
- To upload training information and
- Provide a forum for members to communicate with each other.

Access to funds, IT Resources and Capacity

ZWPFT have 347 paying members, with 40 members that pay \$100 amongst them. This gives us confidence that ZWPFT will be able to get access of cash to maintain the website online. Currently the staff is comprised of voluntary workers which should be of concern in terms of access of funds.

AS for IT Resources, the organization does not own computers and members also don't have computers to use for updating the website. It would be very important for them to have computers specifically for website updates. The Association also doesn't have internet access so they will need to be supplied with a source.

The capacity to maintain the website in terms of updating is high due to past trainings with the previous developer and the ability to appreciate computers. ZWPFT will need just a refresher course on how to update the new functions.

Observed/assessed Short comings

The major challenge we observed is the availability of the current website that hasn't been paid. This will also cause confusion when ZWPFT is registered on Google as the other website could appear on search results. This will result in the credibility of ZWPFT to be lost as people will wonder why they left the other domain. The other issue could be the lack of internet access for the institution.

PART III: WEBSITE DEVELOPMENT SUGGESTIONS

SHORT TERM:

For now we suggest each of the Association/Union register relevant domains for the website files. They could enjoy corporate emails and have hosting solutions available while the website development is in progress. Securing the domain name earlier will enable the propagation processes to be done in time before uploading the files.

While we are still in the infant stage of development, the individual association/unions will supply the relevant material for website development and proto-types will be created for presentation and acceptance.

After website creation, there is a need to educate the members on how to use the website as a whole to bring the best out of their organization. Separately we will then provide training for the updating of the website. This usually requires at least three people during this process.

After development of the website we can upload and evaluate the hosting plan to what the association/unions require. We will register the website on search engines and also implement Google tracking codes which will assist us in tracking the pages visited with the areas of concern.

This will assist to establish the areas that can be improved and most visited by individuals. This will be an aspect examined in the Long term area of website redesign.

LONG TERM

The Association/Union will be advising us whether they are comfortable with the website maintenance/ updates and any other changes they think might be necessary. After a while and depending on the growth of each association/union, they can also consider purchasing their own server and host both the emails and the website.

After implementing Google tracking codes, in a year or two, there is a need to revisit the website and check the area's most visited and try to improve the website in accordance to this criterion.

PART IV: NEXT STEPS

WHAT IS PROPOSED TO BE DONE FOR EACH ORGANIZATION AND THE TIME-FRAME?

1. ZFU: Zimbabwe Farmers' Union

Domain registration: We register the new domain of their choice and with the current domain they have try to have the domain pointing to the current site to avoid any confusions.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Union urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

Registration of website on Google search engine and Google tracking codes.

2. ZCFU: Zimbabwe Commercial Farmers' Union

Domain registration: We register the new domain of their choice but they have expressed that they no longer desire the domain they have so will discard the domain and current website.

Hosting Package: They need to support with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Union urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

Registration of website on Google search engine and Google tracking codes.

3. ZWPFT Zimbabwe Women Poultry Farmers' Trust

The domain has been registered. After negotiations with the current hosting environment, we might need to transfer the domain or create a new domain for them.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

Registration of website on Google search engine and Google tracking codes.

4. LMAC Livestock and Meat Advisory Council

Domain registration: We register the new domain of their choice.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

Registration of website on Google search engine and Google tracking codes.

5. HPC :Horticultural Promotion Council

Domain registration: We register the new domain of their choice.

Hosting Package: They need to be supported with an annual hosting package with 99% guaranteed uptime.

Website development: There is need to develop a Website for the association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

Registration of website on Google search engine and Google tracking codes.

6. FACHIG : Federation of Association for Community Self-help Investment Groups

Domain registration: We will try to establish the owner and person hosting the current domain then will have the domain pointed to a more reliable server. If not we register the new domain of their choice.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

7. MAPA: Murehwa Agriculture Producers' Association

Domain registration: We register the new domain of their choice.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

8. DOHOPA Domboshawa Horticulture Producers' Associations

Domain registration: We register the new domain of their choice.

Hosting Package: They need to be supported with an annual hosting package with guaranteed uptime.

Website development: There is need to develop a Website for the Association urgently.

Time Frame Proposal: Given support and resources within a month website will be online.

APPENDIX 1: CONSULTANT'S QUESTIONS TO ORGANIZATIONS

- Type and number of computers and do they have servers.
- Internet connectivity – if it exists, the speed, reliability and availability, who are the service provider?
- Who is your target market?
- IT support – who is providing them with IT support
- Do they have a website
- Do they have a domain name specific to their association? If yes who is it with?
- Do they have email setup and access? What is their vision of the website? Why do they want to have it?
- Have you reviewed websites of similar or other associations? If yes, name some of your favorite ones?
- What is their understanding of social media and presence? Do they use social media now even on individual basis?
- Do they have a company branding/profile (marketing material)? Do they have a soft copy of the logo?
- What services do they want exposed on the website – including publications?
- Partner organizations – do they want to expose them?
- What they think about a photo gallery
- What they think about a Contact us form to make it easy to communicate
- FAQs if they are assisting
- How many times do you want to update the website, advocate on a daily basis
- Do you have a person who has a computer background and would want the duty of updating the website
- How do you inform members about events?
- What other communication tools you have e.g newsletters

APPENDIX 2: CONSULTANTS AND ORGANIZATIONS MEETING SCHEDULE

Name of Organization	Date and Time	Address and Contact Details
Farmer Association for Community Self Help Investment groups (FACHIG)	Date: 16 January 2013 (Wednesday) Time: 1000hrs	Bindura Dr Mupetsi: 0772228898
Zimbabwe Farmers Union (ZFU)	Date: 17 January 2013 (Thursday) Time: 0900hrs	102 Fife Avenue, Harare Theresa Makomva (Mrs): 0772327612
Zimbabwe Women Poultry Farmers Trust (ZWPFT) CANCELLED	Date: 17 January 2013 (Thursday) Time: 1400hrs	Doctor Henn's Offices Teverai Nhapi (Mrs): 0774115578
Horticulture Promotion Council (HPC)	Date: 18 January 2013 (Friday) Time: 0900hrs	23 Sloan Avenue, highlands Harare Basilio Sandamu (Mr): 0772878442
Zimbabwe Commercial Farmers Union (ZCFU)	Date: 18 January 2013 (Friday) Time: 1300hrs	TBA Shadreck Tsimba (Mr): 0772619741
Domboshava Horticulture Producers Association (DOHOPA)	Date: 21 January 2013 (Monday) Time: 0900hrs	Zim-ACP offices Claudious Marimo (Mr): 0733275159
Livestock and Meat Advisory Council	Date: 21 January 2013 (Monday) Time: 1400hrs	Agriculture Show grounds Crispen Sukume(Mr): 0733728922
Murehwa Agriculture Producers Association (MAPA)	Date: 22 January 2013 (Tuesday) Time: 1000hrs	Murehwa Mutsa Chinyadza (Miss): 0779157185
Zimbabwe Women Poultry Farmers Trust (ZWPFT)	Date: 22 January 2013 (Tuesday) Time: 1400hrs	Doctor Henn's Offices Teverai Nhapi (Mrs): 0774115578
Commercial Farmers Union	Date: 23 January 2013 (Wednesday) Time: 0900hrs	Zim-ACP offices: Marc Carrie Wilson (Mr): 0772865199

ASSESSING MEMBERSHIP DATABASE NEEDS AND SCOPING OUT THE DEVELOPMENT AND ESTABLISHMENT OF THE MEMBERSHIP DATABASE FOR EIGHT (8) ZIMBABWE FARMERS UNIONS AND ASSOCIATIONS

Prepared – Ms. Neeran Saraf, IT Consultant, DAI International

February 2013

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ACRONYMS

ACP – Agriculture Competitiveness Program

AMS – Association Management System (software)

CFU – Commercial Farmers Union

COTS – Custom Of The Shelf software

DOHOPA - Domboshava Horticulture Producers Association

FACHIG – Farmers Association for Community self Help Investment Groups

HPC – Horticulture Promotional Council

LMAC – Livestock and Meat Advisory Council

MAPA – Murhewa Agriculture Producers Association

USAID – United States Agency for International Development

ZCFU – Zimbabwe Commercial Farmers Union

ZFU – Zimbabwe Farmers Union

ZWPFT – Zimbabwe Women Poultry Farmers Trust

EXECUTIVE SUMMARY

This report is a result of an assessment conducted over a period of two weeks in Harare Zimbabwe to review the current ZIM-ACP farmers' organizations and unions membership information systems and technology resources and capabilities. The objective of the report is to summarize the information captured from numerous meetings with the selected organizations in Harare – Zimbabwe Farmers Union (ZFU), Zimbabwe Commercial Farmers Union (ZCFU), Zimbabwe Women Poultry Farmers Trust (ZWPFT), Horticulture Promotion Council (HPC), Domboshava Horticulture Producers Association (DOHOPA), Livestock and Meat Advisory Council (LMAC), Commercial Farmers Union (CFU), Murhewa Agriculture Producers Association (MAPA) and Farmers Association for Community Self Help Investment Groups (FACHIG).

During these meetings, it became obvious that there was a lack of a process and system to track organization membership, IT infrastructure and resources, funding for IT and association membership and management system, and focus and understanding of the membership base and the services and functions of the organizations. Although there is an active leadership group within each of the organization interviewed, yet there isn't a well defined plan to tackle the problem of membership dues and payment of fees from the members. Consequently, there isn't a full understanding of the needs of the members and the focus on the services and the mission of the organization.

Although very few of the organizations interviewed are using an automated system – a membership MIS system or an Excel based tracking system, it is apparent that even these systems are not used in a systematic approach with regular updates and tracking of active and paying members, and the services provisioned by each of the members. Additionally most of the organizations had similar organization governance structure consisting of a leadership team at the top – national or provincial, followed by a provincial level, then district, then ward and village at the lowest level. The majority percentage of the members is located at the village level of the organization structure with member representatives elected at the various levels. A lack of a formal well defined communication strategy between the levels is not defined. Meetings and decisions at the top level are often not communicated to the lower levels resulting in decisions and actions taken by the leadership of the organization without an informed process about the actual needs of the paying members who sit at the lowest level of the organization structure.

Based on the above and the limited time to meet with each organization, the following are specific suggestions for the Zim-ACP team on how best to proceed to implement an improved membership tracking system and increase the organizations' membership numbers and dues payment and services offered and enhance the communication:

- **Zim-ACP** – initiate with each organization a revised definition of their membership base resulting in a well defined member types, structure and fees. Identify a common set of data to capture and track for each member type.
- **Participating organizations** – data verification of the existing Excel based member database and updating the database with the new defined member data set.

- **Zim-ACP** – offer technical advice and guidance on the governance structure and the services these organizations are offering to their members.
- **Zim ACP** – select two or three pilot organizations to implement a membership database system. Define the requirements for each organization and select a COTS association management system to implement for the pilot organizations.
- **Zim ACP** – after the pilot phase, deploy the membership database system to the other organizations when feasible.

INTRODUCTION

Ms. Neeran Saraf, the IT Consultant, visited Zimbabwe from January 12th, 2013 to January 25th, 2013 to meet with Zim-ACP selected farmer organizations and assess technology resources and capabilities to track their members and payment of membership fees. Ms. Saraf's list of meetings for this assignment are attached in Appendix 1 respectively. The consultant along with a local IT consultant, Mr. Gilbert Kapswara, met with the Zim-ACP team in Zimbabwe and the member organizations participating in the program. This report is the result of Ms. Saraf and Mr. Kapswara's meetings, findings and assessment of the IT systems used, the governance and membership structure of each organization, the services offered to the members and the technical capacity and competency of each organization.

The report consists of four parts.

- Part I offers an overview of organizations' governance and membership structures.
- Part II details the consultants' findings
 - The IT resources and capacity in the organizations.
 - Membership, subscriptions and dues
 - Governance structure and Communications
 - Services offered
 - Access to funds, computer resources and support
 - Quality of data captured
- Part III identifies the suggestions the consultants offer to address the findings in Part II. These suggestions are categorized into short term and long term suggestions. The short term suggestions include:
 - Strategy for capturing adequate membership data for each organization and update to the existing membership data.
 - Phase one implementation of a membership management system for selected pilot organizations.
 - Review of the existing membership structure and member types for each organization and creation of a more defined member types, structure and fees.
 - Review of the existing processes for collecting new member applications and updates eliminating redundant steps and duplicate data entry and promoting full automation of the process.

The long term suggestion addresses the full integration of the membership data base, the services offered, the governance structure and the organization website as one seamless entity. For organizations with publications, research and advisory services, the long term suggestion also includes the implementation of a knowledge management system with proper taxonomy and integration in the website. For LMAC, ZFU, ZCFU and similar organizations the implementation of industry best practices for data analytics and the integration of powerful report and GIS tools, all integrated and available on the website.

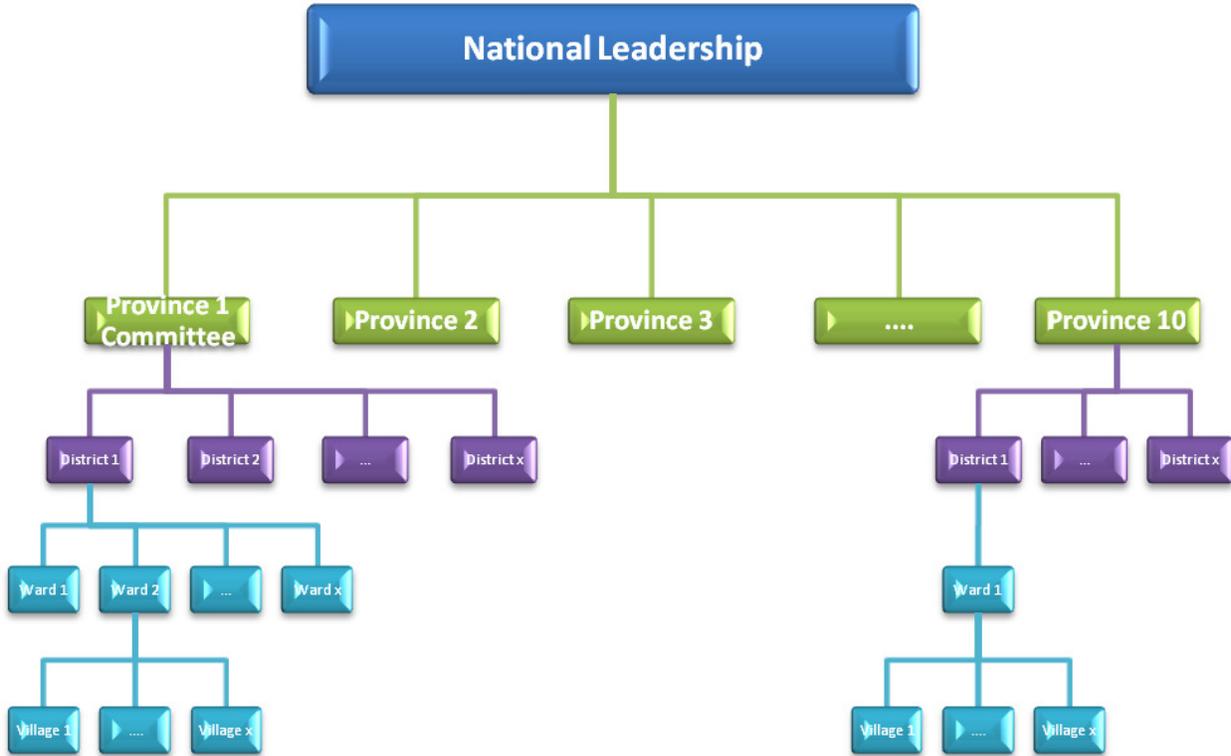
- Part IV identifies the proposed next steps from the short term suggestions – identifying pilot organizations, selection of local software development partner company, selection of COTS AMS software and the implementation and deployment of the membership database system to the pilot organizations.

PART I: GOVERNANCE AND MEMBERSHIP STRUCTURE

1.1. GOVERNANCE STRUCTURE

Most of the organizations interviewed had similar governance structure. The governance structure is a pyramid with the leadership of the organization at the top level – national level for organizations such as ZFU and HPC and provincial for organizations such as FACHIG and DOHOPA, expanding to the village level where the farmer membership and the grassroots services are offered. ZFU, ZCFU, CFU, HPC, ZWPFT and LMAC all operate on a national scale, while FACHIG, DOHOPA and MAPA operate on a provincial and district level.

In general most of the governance structure in all organizations starts with groups of farmers at the village level. These groups vary in sizes and label depending on the organization. From the village level, a member is elected for each group to represent the village at the ward level. A governance committee is formed for each ward representing the villages and farmers within the ward. At this level, commodity committees are also formed such as the poultry committee and other specialized commodities. From each ward, a member is elected to represent the ward at the district level. Similar to the ward, for each district there is a governance committee and additional commodity committees.



1.2 MEMBERSHIP STRUCTURE

Although the governance structure is multi layered, the membership structure is flat. Individual farmers are members of an organization. There does not seem to be a clear demarcation between the farmer as an individual and the homestead or farm as a member of an organization. In certain organizations, any individual farmer may become a member of the organization resulting in multiple members for the same homestead. Other cases, the homestead or a corporation (in the case of HPC) is the member and the owners are associated individuals for the membership. In the case of larger organizations such as ZFU, ZCFU, CFU, and LMAC, they also have farming organizations and associations as members. For example, DOHOPA, MAPA, FACHIG and LMAC all identify themselves as members of ZFU. Most of the organizations interviewed have some form of membership tracking tool, paper based at one end of the spectrum (MAPA) and a membership database system at the other end (ZFU and CFU). None of the organizations interviewed had an accurate up to date view of the number of active paying members. Additionally there is no consistent tracking of the members profiles – age/date of birth, gender, marital status, crops grown, membership renewal date, ... All organizations track the name, age, address and date became member and the list is updated on regular basis, often monthly. Member application forms are completed at the village level. On a monthly or less frequent basis, the set of new and updated applications are sent to the corresponding ward. At the ward level, applications from the various villages are consolidated and sent to the district level. Depending on the organization interviewed, consolidation is either in the form of paper or Excel spreadsheet. At the district level, most of the consolidations are done using an Excel spreadsheet, except for the case of MAPA. District Excel spreadsheets are aggregated at the province level and from there to the national master membership database. At the lower levels, data is verified and aggregated manually. At the province and the national levels, some organizations have implemented a more automated form of data aggregation although the steps involved are executed manually by the membership team or the IT team at that level.

PART II: FINDINGS

After the assessment of the organizations, there are a number of areas of concern and remediation for the requisite organizations. This section covers common observations of and suggestions for the organizations interviewed. Individual assessment of each organization is included in Appendix 2.

a) IT Resources and Capacity

For most of the organizations, we conducted the meetings at their offices to better assess their infrastructure and IT resources. We inspected the equipment they had and met with the IT team, when applicable. Some organizations did not have any computers or an IT technical staff. We can classify the organizations into three categories. The first category is the group of organizations who have adequate computer power, Internet access, and technical support (internal or outsourced). The second category is the set of organizations that have limited computer capacity and Internet access. The third category is the list of organizations with no computer access, no Internet and in some of the cases no electricity. The table below summarizes the categories and their organizations.

Table 1 - IT Capabilities Summary

Category	Description	List of organizations in this Category	Comments
Full	<ul style="list-style-type: none"> -Have adequate access to computers -Have an automated system to track members (Excel or Membership database system) - Have Internet access - Have electricity - Have technical support 	<p>CFU – most advanced of all the organizations we met with. They have a functional members database system</p> <p>LMAC – use Excel and email to track members on behalf of their members associations</p> <p>ZFU – has adequate computer and functional database system and Internet access</p>	<p>The organizations in this category do not have adequate funds to maintain their systems and in the case of ZFU they do not have funds to hire IT support to use the system.</p>
Partial	<ul style="list-style-type: none"> -Have antiquated computers. -Have limited access to Internet - Electricity is intermittent - Technical support is on as needed basis 	<p>ZCFU – they have a non functional database system. Currently use Excel.</p> <p>FACHIG – use Excel to track members.</p> <p>ZWPFT – use MS Access database to track members</p>	

Category	Description	List of organizations in this Category	Comments
		HPC – use Excel to track members	
None	-currently have no computers - no internet access	DOHOPA MAPA	DOHOPA can reach out to their members for computers and internet access. MAPA – there is an infrastructure challenge with no electricity in the region or access to the Internet.

b) Membership, subscriptions and dues

In general, there is a lack of definition of the membership types in each organization. When asked, organizations listed multiple types of members – individual farmers, associations, homesteads. However in the Excel and membership database systems, members are tracked as individual farmers. Most of the organizations have nominal membership fees, one or two dollars per annum. Despite the low membership fees, the organizations are still not able to collect the fees from their existing members. Members tend to renew or pay their membership fees when a specific service is offered by the organization such as distribution of free fertilizers.

c) Governance structure and Communications

The multi layer governance structure depicted in Part 1 is common among all organizations interviewed. All organizations has leadership committees at Province, District and Ward and membership groups at the village level. They all had commodity committees at the ward and upper levels in parallel to the leadership committees. During our meeting with the farmers, there seems to be a breakdown of communications between the governance levels. Decisions regarding services and advocacy at the top levels are not communicated to the ward or village levels. Organization members at the district level are not aware of conferences and meetings at the province and national level. This break down of communication creates a perceived lack of transparency and address of the actual needs of the members.

d) Services offered

All organizations offer similar services and serve same functions to their members. The main exceptions are CFU and LMAC. LMAC is more focused in the services and functions offered to their association members. When asked, all organizations offer advocacy, commodity groups, negotiated prices, and training. This multiplicity of organizations offering similar broad services and functions to their members is confusing to the farmers and not viable as it dilutes the focus and resources of the organizations.

e) Access to funds and computer resources and support

All organizations have limited or no funds allocated to IT procurement and support. The lack of funding shall make it difficult for these organizations to implement membership database system and support them in the long term.

f) Quality of data captured

All organizations interviewed did not have a data verification process of their membership data. Paper

based organizations did not capture information about deceased or members who are no longer part of the organization. Nor did they capture updated information of the members such as address, contact information, or last renewal date. The situation is the same for organizations with Excel or database based membership systems. The reason being that in all organizations the source for collecting new member data and updated member data is at the village level and this process is a manual paper based process. This process results in obsolete and inaccurate membership count and data.

The table below summarize the membership database and tracking by the participating organizations.

Table 2- Membership Database and Tracking Summary

Organization Name	Membership types	Website	Membership database system	Internet access	IT support
CFU	Large commercial farmers Organizations Associations	Yes	Yes – Access based	Yes	Outsourced
DOHOPA	Individual Farmers	No	No	Yes – through their member base	None yet
FACHIG	Individual farmers	Yes	Yes – Excel based	Yes – limited	Outsourced
HPC	Corporate farmers Individual Farmers Traders and agri related businesses	Yes	Yes – Excel based	Yes	Outsourced
LMAC	Associations		Yes – Excel based	Yes	Internal
MAPA	Individual farmers	No	No	No	No
ZCFU	Commercial farmers Individual farmers Organizations and commodity associations	Yes	Yes – two systems, database is not functional, use Excel	Yes	Internal
ZFU	Individual farmers Organizations and commodity associations	No	Yes – SQL server membership system	Yes	Currently none – funding issues
ZWPFT	Individual Poultry	Yes	Yes – MS Access based	Yes	Outsourced

	farmers				
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PART III: SUGGESTIONS – SHORT TERM

There are a number of short term suggestions that can be implemented to help the participating organizations.

a) Membership

Lack of demarcation of what constitutes a member. Homesteads and corporation can be members and individual farmers members can be linked to them. Organizations should review their existing membership structure; define member types and the data to capture for each member type. Most of the organizations interviewed have one flat membership fee. With the definition of new member structure, organizations should also define a fee structure that corresponds to it.

Zim ACP - can spearhead this effort with the participating organizations offering a restructuring process and identifying a minimum common set of data for all organization to capture about their members.

Participating organizations – once the new structure is defined, participating organizations should embark on a cleanup effort of their existing membership data.

b) Pilot implementation

Zim ACP should select couple or three organizations as pilot for the initial implementation of a membership database system. Along with the pilot organizations, identify local resources for the implementation, training and support of the proposed membership system.

c) Cloud based solutions

Zim ACP with the help of the IT consultants should explore the use of cloud or hosted solutions for the membership data base system. This will eliminate the need for individual database server for each organization and the overhead and cost of supporting and maintaining these servers.

Part III: Suggestions – Long term

a) Website Integration

It is evident that the most valuable asset of an organization is its members. To keep member data accurate and up to date, it is best to encourage members to update their information and to make this feature available and easy to use. Additionally an organization can use its website to link members together through online limited access member directory, members-only chat forums and free access to technical resources. To achieve these, the long term vision for this project should be to integrate the membership database with the organization website. Through this integration, members can procure services and register for trainings and events online.

b) Reporting, Data Analytics and GIS

As organizations capture more data about their members and have a reliable and accurate membership

database system, they can use industry standard reporting and data analytics tools. These tools contain features to analyze the demographics of an organization's membership base, services and trainings procured by members and the frequency of such events. And for organizations such as LMAC and others acting as a source of data about farmers, crops grown based on region and other criteria, these tools present infinite reporting capabilities and mapping of data on GIS and visual representation. Organizations such as LMAC and others can become sustainable by offering such statistical data to external entities for a fee.

c) Knowledge Management Systems

CFU and other organizations have developed research and technical publications that are useful for farmers and partners in the agriculture industry. Currently this data has limited visibility and use because of lack of search capability and cataloguing. Some of these publications are in paper format or archived in digital format that is not accessible to the farmer or other interested parties. With the use of a knowledge management system and the proper classification schemes, these documents can be made available to the end user through the integration of a knowledge management system and an organization's website.

PART IV: NEXT STEPS

From the suggestions listed in Part III – short term above, the following should be implemented at the earliest:

Zim ACP

- a) It is critical that prior to implementing a membership tracking and an association management system for each organization, a review and definition of the membership structure, member types and member data is conducted.
- b) Identify two to three pilot organizations for the initial implementation of a membership database system.
- c) Identify a local partner to work closely with the pilot organizations to define the membership requirements and develop a requirement matrix.
- d) Solicit proposals from local or regional software development companies to implement a COTS AMS system that meets the list of identified requirements
- e) Select a vendor and COTS product to implement the membership database with the pilot organizations

Participating Organizations

- a) Embark on a clean-up and update effort of the members data in existing Excel spreadsheets or databases.

Figure 1- Membership Database Pilot Implementation Plan

ZIM ACP													
Assessing Membership Database Needs and Scoping out the development and Establishment of the Membership Database for Eight (8) Zimbabwe Farmers Unions and Associations													
Proposed Next Steps													
Proposed step	Period	Month 1			Month 2			Month 3			Month 4		
1. Strategy for Implementing an association management system	32 days												
1.1 Identify 2-3 pilot organizations for the implementation. These should be representative organizations													
1.2 Meet with the organizations and review and possibly re-engineer the membership structure and governance structure, including commodity and functional committees													
1.3 Capture detailed requirements - define member types, set of attributes to capture for each member type, relationships between individual members, commodity and functional committee, tracking and registration for additional services such as trainings, meetings, etc. terminology Output of this step is a requirements document and a requirements matrix identifying key required functionality													
1.4 Review of various AMS systems along with local software development companies. Using the requirements matrix, identify suitable two to three AMS COTS products and local companies that can be engaged to implement the system ICF and ICBG systems and identify an architecture for sharing information in automated process													
1.5 Solicit proposals from the local companies and licensing fees for the AMS systems													
1.6 Create an implementation project plan based on the selected AMS system and the local software company between the systems													

Figure 2 - Membership Database Pilot Implementation Plan (continued)

ZIM ACP													
Assessing Membership Database Needs and Scoping out the development and Establishment of the Membership Database for Eight (8) Zimbabwe Farmers Unions and Associations													
Proposed Next Steps													
Proposed step	Period	Month 1			Month 2			Month 3			Month 4		
2. Implementation of the AMS system													
2.1 System design	10 days												
2.1.1 Based on the requirements and selected AMS, define the configuration and customization approach for each of the pilot organizations													
2.1.2 Define the membership attributes and build the data model													
2.1.3 Identify the core functions to be implemented at this phase (membership registration, dues payment, notifications, renewal, ...)													
2.2 Configuration and Customization of the AMS	48 days												
2.2.1 Configure the AMS system data model based on each organization model													
2.2.2 Configure and Customize the AMS with the core functionality for this phase													
2.3 Data migration	20 days												
2.3.1 Working with each pilot organization, capture data for existing members													
2.3.2 Develop an automated upload process of existing data to new AMS system													
2.4 AMS System testing	12 days												
2.4.1 Develop a test plan based on the defined functions for this phase													
2.4.2 Perform system testing, this includes the core functions and membership data													
3. Deployment of the AMS system and training of the pilot organizations staff	10 days												
3.1 Install the AMS system in the production environment													
3.2 Upload the membership data in the production environment													
3.3 Test the production system													
3.4 Train the pilot organizations end users on the new AMS system													

APPENDIX 1: MEETINGS AND CONTACTS

1. Kick off meeting with Zim-ACP team (Godfrey, Alice, ...)
2. Kick off meeting with participating organizations at Zim-ACP office and the consultants – Database, website, and services consultants
3. Meeting with FACHIG
4. Meeting with ZFU
5. Meeting with HPC
6. Meeting with DOHOPA
7. Meeting with ZCFU
8. Meeting with LMAC
9. Meeting with ZWPFT
10. Meeting with MAPA
11. Meeting with member farmers from different organizations
12. Meeting with CFU
13. Wrap up meeting with Zim-ACP team and consultants

APPENDIX 2: ASSESSMENT REPORTS OF EACH PARTICIPATING ORGANIZATION

1. CFU (Commercial Farmers Union)

Status

- Location: national
- Member types: large operating commercial farmers, displaced farmers, pensioners (retired farmers), and corporate affiliates.
- Number of members: about 200 paid operating farmers, 12 affiliate partners and 800 extended members
- Membership fee: \$600 per year for operating farmer,
\$100 per year for displaced farmer,
\$1200 per year for corporate affiliates
\$20 per year for pensioners (retired farmers)
- Membership database: Yes. MS Access based membership database system. They experimented with online access to the membership database through their website. Members are older generation and did not use the service.
- Website: yes (<http://www.cfuzim.org>). Website is maintained on pro-bono basis by an outside IT consultant.
- Internet access: Yes
- IT budget and Funding: limited
- CFU formed an alliance with ZFU, called the ZFUT funded by EU.

Assessment

CFU is more organized with the membership structure and fees. They have a governance structure and committees that are more aligned with the needs of their members. CFU offers technical advisory services to their members, R&D activities as well as lobby and advocacy. The CFU website is live and updated with publications and research. The website has limited search capability and offers technical and agriculture related news to the user. They have adequate IT capabilities – computers, internet access, and electricity. Funding for IT related initiatives such as enhancements to the website or the membership database is limited.

Suggestions

CFU can benefit from advice and support to enhance their website and transform the website into a knowledge portal for Agriculture for the country. As per our meeting with them, they have a vast number of documents that will be archived. It would be very beneficial to transform these documents into digital format, implement a knowledge management system and make these documents available on the website with user friendly searchable format.

2. DOHOPA (Domboshava Horticulture Producers Association)

- Location: Domboshava
- Membership types: individual farmers and homesteads
- Number of members: 700
- Membership fee: \$3 (three dollars) per annum
- Membership database: No. 100% paper based.
- Website: No
- Internet access: none but can reach out to their members
- Computer and IT resources: none but can reach out to their members with computers and Internet access.
- IT budget and funding: none

Assessment

DOHOPA is a relatively young organization with a regional focus and a small membership base. Like the other organizations in this program, DOHOPA is attempting at offering similar services that are offered by the other organizations including lobbying and advocacy. They have a governance structure and a parallel commodity committees structure. For an organization the size of DOHOPA, they should be adopting a simple governance structure and creating functional committees focused on the members' needs. For specific commodity services, they can resort to HPC and other commodity associations for support. The organization has very strong women representation. The chair of the board is a woman and most of the board members are women. Presently they capture limited information about their members. With the use of automated tools, they should be able to capture more data about their members. Since the meeting with DOHOPA was conducted at the Zim ACP offices, we were not able to assess the organization infrastructure capabilities and IT resources.

Suggestions

Suggested next steps for DOHOPA are:

- Technical advice for organization management and guidance from Zim ACP.
- With the support from Zim ACP, a review of DOHOPA's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Identify the set of data and information to capture and track about their members.
- Focus on the region DOHOPA's is operating in and identify the relevant services needed by the members.
- Review of their IT capabilities and resources. If none available then identify sources to offer these services – whether members volunteering their computer power and internet access, or raising funds to procure the equipment, or thru the support from Zim ACP.
- Implement an Excel based membership system or it can be one of the pilot organizations for the first phase of membership database implementation. This hinges on the availability of computers and human resources to sustain the database.

3. FACHIG (Farmers Association for Community self Help Investment Group)

- Location: operates in four districts
- Membership types: individual farmers, organizations, and homesteads
- Number of members: total of 12600 in the four districts, with 73% women and 27% men

- Membership database: Yes. Excel based at the Province and District level. At the ward and village level, membership tracking is paper based. Membership applications and updates are sent on a monthly basis to the District and then Province.
- Membership fee: \$1 per annum
- Website: Yes (<http://www.fachig.org>)
- Internet access: yes and reliable provided electricity is available
- Computer and IT resources: they have about five computers. However, most of these computers are very old desktops and in need of upgrades. The computers are connected through a local area network.
- IT budget and funding: very limited
- Rating: they have initiated a rating system for their members at the Ward level
- FACHIG manages Federal Cotton Processors Associations which has about 12,000 members. They use Excel spreadsheet to track the members.

Assessment

FACHIG is one of the organizations that is regularly tracking and updating information about the members. The updates are done on monthly basis. However the data tracked is not consistent and there are a number of critical data elements that are not populated in the spreadsheet. At the village level, FACHIG is still a paper based application organization. The process for new member applications and member information update is not efficient. It is paper based and duplicated data consolidation until it reaches the district level. At the district level, program officers aggregate the data and enter them in an Excel spreadsheet. These in turn are sent to the head office to be included in the master membership Excel sheet.

FACHIG has two Excel membership databases. The first is for the FACHIG members and the second is for the Federal Cotton Growers Association. It was not clear the relationship between FACHIG and the Cotton Association. FACHIG is responsible for maintaining the association's membership database of 12,000 members. FACHIG is a member of ZFU.

FACHIG has a number of desktop computers at their head office and each of their project officers at the district level is also equipped with a computer. The computers are old (some are with floppy drives which is very old technology). The computers are connected through a local area network without a common file server to share files and data. They have a dedicated staff for membership Excel database maintenance.

Suggestions

Suggested next steps for FACHIG are:

- With the support from Zim ACP, a review of FACHIG's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Revise the set of data currently captured about the members. Based on the new defined set of data, embark on a cleaning of the existing Excel member database to reflect up to date member information and accurate data.
- Focus on the region FACHIG is operating in and identify the relevant services needed by the members.
- Upgrade of the existing IT equipment for the staff at the head office and the district level
- Refine the process of member database update by incorporating automated processes to

minimize duplicated data entry of member data. This may require equipping the staff at the ward level with access to computers

- FACHIG can be a candidate pilot organization for phase one of the membership database.

4. HPC (Horticultural Promotional Council)

- Location: national

- Membership types: An apex body of five associations, Export flowers, Fresh Produce, Citrus growers, Nyanga fruit growers, Mbare Musika Traders Association (largest wholesale and retails fruits and vegetables in the market). They are expanding their membership base to include traders and other commodity associations.

- Membership fee: \$200 per month

- Number of members: about 200 members plus DOHOPA and MARAPA members. There are about forty flower growers, fifty wholesalers, fifty Mbare Musika, and twenty citrus growers.

- Membership database: Yes. Excel based spreadsheet.

- Website: No

- Internet access: Yes.

- Computer and IT resources: the office staff has computers. Their members are very well connected (smart phones, iPads, and computers). The members are large producers who have their own websites and connections with International organizations and exporters.

- IT budget and funding: limited

Assessment

HPC is an organization with very well informed members. Some of the members are medium and large scale commercial farmers with international business and requirements. HPC is expanding its membership base and scope because of the decline in the flower agri business. Like the other organizations in this program, HPC offers advocacy, lobbying, price negotiations and other services to its members. They have a governance structure and a parallel commodity committees structure. HPC is reinventing itself and as a result it is redefining its membership base and the needs of the new member types. HPC members are well established and have advanced access to computers, their own websites and contact with the international community. HPC has a high percentage of paying members who are active in the board and leadership of the organization. HPC staff has access to computers and internet. Their membership database is Excel based.

Suggestions

Suggested next steps for HPC are:

- technical advice for organization management and guidance from Zim ACP.

- With the support from Zim ACP, a review of HPC's plans to expand its membership base and membership structure and fees to identify the member types.

- Develop functional focused committees to better serve their members.

- Identify the set of data and information to capture and track about their members.

- Focus on the services needed by the expanded membership base.

- Review of their IT capabilities and resources, if necessary reach out to their members for such services.

- Implement a membership database system. If HPC is selected as one of the pilot phase one

organizations, the expanded membership base must be well defined prior to the implementation.

5. LMAC (Livestock and Meat Advisory Council)

- Location: national
- Membership types: An umbrella body representing the Pig association, Poultry and Sotck feed producers.
- Membership fee:
- Number of members: livestock and meat associations
- Membership database: Yes. Excel based spreadsheet.
- Website: No
- Internet access: Yes.
- Computer and IT resources: the office staff has computers.
- IT budget and funding: limited

Assessment

LMAC is different than the other participating organizations. It is an umbrella body representing Pig association, Poultry and Stock feed producers. LMAC staff manages the membership of their member associations. They handle all communication with the members, membership dues, coordinate meetings with the associations and respond to member queries. LMAC captures statistical information from their member associations and other associations and organizations in the industry. They generate statistical reports and studies and offer these as services to their members and others outside the organization. LMAC uses Excel spreadsheets and Microsoft outlook email to deliver these services. They communicate through email with their member associations. On regular basis, the associations deliver Excel spreadsheets about their membership. LMAC in turn captures these spreadsheets and retrieves statistical information to use in their research and studies. LMAC has adequate computers and access to the Internet. They have a team of four members some dedicated to IT support and management of the Excel spreadsheets.

Suggestions

Suggested next steps for LMAC are:

- Revise the set of data currently captured about their members associations' members. Based on the new defined set f data, embark on a cleaning of the existing Excel member database to reflect up to date member information and accurate data.
- Review of the process for capturing the data of associations members. Implement a membership database system and an automated process for each member association to upload the members' data.
- Implement a data analytics tool for the research and reporting services of LMAC.

6. MAPA (Murhewa Agriculture Producers Association)

- Location: Murhewa
- Membership types: individual farmers in the Murhewa province/district.
- Membership fee: \$2 per annum
- Number of members: about 500.
- Membership database: No, 100% paper based.

- Website: No
- Internet access: No and no electricity.
- Computer and IT resources: none.
- IT budget and funding: none

Assessment

MAPA is a small organization with a small membership base focused on the Murhewa district. They have limited resources – no electricity, no access to the Internet or computers. The organization has very strong women representation. They track their members using a paper based application system. Presently they capture limited information about their members.

Suggestions

Suggested next steps MAPA are:

- technical advice for organization management and guidance from Zim ACP.
- With the support from Zim ACP, a review of MAPA's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Identify the set of data and information to capture and track about their members.
- Focus on the district MAPA is operating in and identify the relevant services needed by the members.
- Provide a computer or a laptop to track their members using an Excel based system.
- Develop a one page website to promote MAPA as the organization in the district.

7. ZCFU (Zimbabwe Commercial Farmers Union)

- Location: National
- Membership types: commercial and individual farmers, commodity associations, organizations.
- Membership fee: tiered based on land size
- Number of members: 15000 (fifteen thousand).
- Membership database: Yes, they have developed a web based database system. The system is currently not functioning correctly. Instead, they are using Excel spreadsheet to track the members.
- Website: Yes (<http://www.zcfu.org.zw>)
- Internet access: Yes
- Computer and IT resources: computers at the office, connected thru a local area network. A staff member is responsible for the database, updates of the website and the monthly publication.
- IT budget and funding: none
- Other: monthly publication sponsored by agri suppliers and vendors. Distributed freely to the members. Available in pdf format on the website.

Assessment

ZCFU is one of the more established farmers' unions in the country. It has a governance structure with the leadership at the national level and local volunteer associations at the ward and village level. It also has specialized national executive committees focused on youth, legal, auditing and women in agriculture. Its members are commercial farmers with tiered membership fees based on land size. ZCFU organizes multiple fundraisers to generate revenue. The fundraisers are sponsored by agriculture related suppliers, vendors and service providers. These

are the same advertisers in their monthly publication which support the publication and distribution of the magazine. ZCFU is struggling to update its Excel based membership database with more accurate information about their members because of lack of resources (human and computers). ZCFU uses SMS technology to reach out to its members. Currently the SMS list is not linked to or updated with their membership database.

Suggestions

Suggested next steps for ZCFU are:

- With the support from Zim ACP, a review of ZCFU's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Revise the set of data currently captured about the members. Based on the new defined set of data, embark on a cleaning of the existing Excel member database to reflect up to date member information and accurate data.
- Review of the services offered and redefine the focus of these services.
- ZCFU should be one of the pilot organizations for Phase one of the membership database implementation plan.
- Upgrade of the existing IT equipment for the staff at the head office and the province and district levels.

8. ZFU (Zimbabwe Farmers Union)

- Location: National
- Membership types: individual farmers nationally.
- Membership fee: \$1 per annum
- Number of members: about 192,000 aggregate, 22000 in the last year with only 8500 entered in the membership database system (tracked). High representation of women.
- Membership database: Yes. MS SQL server database membership system. The system has been developed for ZFU. The IT staff is no longer with ZFU because of funding issues.
- Website: No
- Internet access: Yes.
- Computer and IT resources: They have none.
- IT budget and funding: none

Assessment

ZFU is the oldest union in the country (72 years old). It has a governance structure with the leadership at the national level and local representation at the village level. Although it has a large base of women members and a women committee, it currently has only one woman at the national board level. ZFU struggles with the collection of the membership dues and does not have an accurate count of active paying members. They have an elaborate SQL Server based membership database system that was developed specifically for their needs. Because of limited funding, ZFU is not able to support the system and at the time of the meeting, they did not have any IT staff dedicated to the system. As a result the system is not being used and the membership is not updated.

Suggestions

Suggested next steps for ZFU are:

- With the support from Zim ACP, a review of ZFU's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Revise the set of data currently captured about the members. Based on the new defined set of data, embark on a cleaning of the existing SQL Server member database to reflect up to date member information and accurate data.
- Revise the governance structure to include functional and commodity committees for the members.
- ZFU should be one of the pilot organizations for Phase one of the membership database implementation plan.
- Upgrade of the existing IT equipment for the staff at the head office and the province and district levels.

9. ZWPFT (Zimbabwe Women Poultry Farmers Trust)

- Location: National
- Membership types: individual farmers, aimed at Women poultry farmers, although currently 90% of the membership is men.
- Membership fee:
- Number of members: about 500 with 10% women and 90% men.
- Membership database: Yes. MS Access based database to track members.
- Website: Yes. <http://ZimWPFT.com>. The site is currently unavailable. This can be due to lack of payment to the ISP hosting company.
- Internet access: Yes.
- Computer and IT resources: They are using their own personal laptops.
- IT budget and funding: none

Assessment

ZWPFT is a young organization with a national focus to support and promote women poultry farmers. It has a small membership base of 500 members. Like the other organizations in this program, ZWPFT struggles with collecting membership dues from its members. Although ZWPFT is women focused, currently 90% of its members are men and one third of the board is men. ZWPFT has very limited resources – human resources and funding to support its operational cost. For their membership database, they have an MS Access database system updated with the current members. ZWPFT is a member of Zimbabwe women business association, the Poultry association, ZFU, and other organizations.

Suggestions

Suggested next steps for ZWPFT are:

- technical advice for organization management and guidance from Zim ACP to focus on the women aspect of the organization's mission and increase its women members.
- With the support from Zim ACP, a review of ZWPFT's existing membership structure and fees to identify the member types – in case of homestead members, how best to capture individual farmers and their relationship to a homestead member and corresponding fee structure.
- Identify the set of data and information to capture and track about their members.
- Focus on the needs of women poultry farmers and position the organization as the representative

of their voice.

- Possible candidate for one of the pilot organizations since it is a gender focused organization.

STUDY TO ASSESS SERVICES DEMANDED BY MEMBERS OF FARMERS AND AGRIBUSINESS ORGANIZATIONS AND ACTION PLANS TO BUILD CAPACITY FOR SERVICE PROVISION

ZIMACP

V.Vudzijena

15 April, 2013.

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ACRONYMS

Agritex	Agriculture, Technical and Extension Service
AMA	Agriculture Marketing Authority
CFU	Commercial Farmers Union
CBZ	Commercial Bank of Zimbabwe
CHIGS	Community self-Help Investment Groups
DOHOPA	Domboshava Horticultural and Poultry producers Association
FACHIG	Farmers Association of Community self-Help Investment Groups
FO	Farmer Organisation
HPC	Horticultural Promotion Committee
IGs	Investment Groups
LMAC	Livestock and Meat Advisory Committee
LIT	Livestock Identification Trust
MAPA	Murehwa Agricultural Producer Association
M&E	Monitoring and Evaluation
ICT	Information Communication Technology
S&L	Savings and Lending Groups
TMB	Tobacco Marketing Board
WFP	World Food Programme
ZCFU	Zimbabwe Commercial Farmers Union
ZFAT	Zimbabwe Farmers Alliance Trust
ZFU	Zimbabwe Farmers Union
ZIMACP	Zimbabwe Agricultural Competitiveness Program
ZINWA	Zimbabwe National Water Authority
ZWPT	Zimbabwe Women Poultry Trust

EXECUTIVE SUMMARY

CONTEXT

Farmers in Zimbabwe, similar to farmers in other developing countries, operate in fragmented, imperfect markets, poorly supported by poor road, rail, telecommunications, information, power and energy infrastructure. Farmers have realized their weaknesses to face the above operational and policy environment as individuals. Transaction costs to access services along the value chains (extension, training, finance, inputs, transportation, and storage, processing and marketing) are disproportionately high compared to gross farm revenues accruable to an individual farmer.

Farmers have therefore formed associations and unions, herein referred as farmer organizations (FOs), to enhance economies of scale and lower transaction costs when accessing and/or providing agribusiness services. Instead of facing the agribusiness services industry and governance institutions (village, ward, district, province, and national) as individuals, farmers find it cost effective to operate as a group along the value chains.

In this regard, FOs will only remain relevant as long as service costs are lowered through economies of scale along the value chains. Without economies of scale at play, that is, accessing/and/or providing services as a group, service costs will remain largely unacceptable to the farmer, irrespective of the value of the service. A great challenge facing FOs is to ensure that farmers have access and take advantage of valuable and affordable services, while continuously advocating and lobbying for policy, infrastructural and regulatory environments that minimize operational costs and maximize revenue. FOs therefore need technical capacity to identify, package and articulate farmers' service needs to the agribusiness services industry, and where economically justifiable, provide missing services.

BACKGROUND

Members of FOs have reduced or abandoned dues payments for membership and subscriptions, forcing some of these organizations to reduce operations significantly and continue operations on the basis of donor subsidies. The USAID, in collaboration with selected FOs, as part of the Zimbabwe Agricultural Competitiveness Programme (ZMACP), implemented by DAI, conducted this study to identify valuable services that FOs could provide in order to attract new members as well as retain old ones, contributing to vibrant and self-sustaining organizations. The study was also expected to analyze institutional gaps that could derail FOs ambitions to supply and/or broker identified services.

METHODOLOGY

Study findings were based on the collection and analysis of secondary and primary data. Secondary data was provided by DAI and some of the nine FOs selected for this study. Extensive literature search was also done on the internet. Primary data was collected through interviews with the nine organizations, selected key informants and farmers. Focus group discussions (FGDs) were conducted with groups of farmers, while key informant interviews were held in Harare, Bulawayo and Mutare. The range of key informants included input manufacturers, output markets, farmer organizations, processing agencies and experts with knowledge and experience in different value chains. Annex 1 shows the list of institutions and

individuals interviewed. Information from FOs was collected through the use of a semi structured questionnaire. Annex 2 shows the questionnaire administered, annex 3 shows study references and annex 4 provides a detailed description on business models generally adopted in regional countries. .

STUDY FINDINGS

The study made three major findings, namely: 1) farmers' demand for services; 2) services being provided by FOs and; 3) services that FOs could provide, based on regional and African experiences. Recommendations were then made on studies and activities considered necessary to assess the economic and technical feasibility of proposed services.

FARMER DEMAND FOR SERVICES

Farmers' demands for services were assessed on the basis of constraints and challenges farmers encounter along crop and livestock value chains. Farmers raised challenges related to; 1) the agricultural policy and regulatory environments; 2) FO governance; 3) agribusiness advisory services-extension, training, input supply, finance and insurance; 4) post harvest handling (storage); 5) value addition (processing) and; 6) product marketing.

The agricultural policy environment: - was found to be generally unfavourable for efficient agricultural operations. Concerns were raised with the land tenure policy that did not provide for collateral security; the Water Rights policy that did not provide for adequate water for irrigation; as well the regulatory environment that empowered the Agricultural Marketing Authority (AMA) and Rural District Councils (RDCs) with power to institute levies without due regard on the impact such levies had on net crop incomes. Trade polices were criticized for supporting imports that flood the local market rendering poultry and other activities unviable. Farmers criticized the ban on GMO technologies for undermining the competitiveness of the Zimbabwe agricultural sector.

Farmer Organizations : - were generally criticized for operating in a non accountable manner. Farmers complained that they did not participate in organizations' planning processes and did not therefore have a material basis upon which to demand accountability. Though appreciated, some of the current programs were considered to be donor influenced to the extent that farmers' urgent demands were not given due priority. Horticultural farmers cited the marketing environment at Mbare Musika, in particular the exploitative practice of makoronyera (middlemen) as a long outstanding issue. Communication systems were considered non - smooth flowing and untimely to the extent that farmers issues were raised only once a year at the Annual General Meeting.

Farmers were generally unhappy with the agribusiness advisory environment, incorporating public and private service providers. They cited the limited capacity of public service departments, in particular AGRITEX and Veterinary Services Department (VETs). Farmers complained of limited services from the private sector, except under contract arrangements. Finance shortages adversely affected input purchases, input transportation and farmer liquidity for daily operations and survival. Many farmers complained that they had no capacity to prepare bids demanded by banks for loan applications. While contract farming arrangements were found to be generally beneficial, farmers complained existing arrangements do not provide for working capital. The Feedlot scheme, under pilot in Matabeleland, provides a good example of contract farming arrangements in the livestock sector, and potential for credit arrangements under this arrangement need to be investigated.

Post harvest handling: - farmers complained of high post harvest losses because of poor storage facilities. This forced farmers to quick sale their products at less competitive prices. Onions, tomatoes, poultry, and other perishable and non perishable crops (maize) were cited in this regard.

Output marketing:-farmers currently reach the consumer via traders, processing agencies and supermarkets. Key challenges raised included delayed payments, particularly by the Grain Marketing Board(GMB) and some oilseeds processors, limited knowledge on different market quality standards as farmers are rarely in contact with the final consumer; limited knowledge on regional and international markets, inappropriate transportation for perishables and low product prices. Farmers complained of high transportation costs to reach urban markets, largely because of the poor road infrastructure, resulting in non competitive rural transportation services.

Value addition:-farmers had no capacity to process products and add value to primary products. Except in the case of coffee, farmers sold their primary products to processing agencies whom they accused of under-pricing products. Cotton was cited in this regard. The cotton processing framework was contrasted with the coffee framework, where farmers owned the coffee processing mill (CPM) in Mutare. Farmers thus owned the coffee throughout the value chain and paid the processing mill for processing costs (toll processing). The processing mill currently focuses on coffee grading and export marketing. Potential still exists for the plant to roast coffee and sell direct to consumers and in the process increase farmer revenues.

Other value addition attempts by some FOs had hit a brick wall. FACHIG ventured into soya processing and went bust due to the economic meltdown. The Mutare Poultry Producer Association (MPPA) has plans to process chicken but faces financial constraints. The Zimbabwe Women Poultry Farmer Trust (ZWPFT), which also has plans to construct a poultry processing plant, finds itself in the same predicament. Potential however exists for FOs to venture into value addition as illustrated in coffee sector, or in partnerships with existing processing institutions.

SERVICES PROVIDED BY DIFFERENT FOS

Service provision differed by farmer organisation and depended on available technical and financial capacities. Despite these differences, farmer organizations provided generic services that included; **1)**farmer training/or facilitation, **2)** extension services/or facilitation, **3)**linking farmers to input and output markets, in particular contract farming; **4)**collaborating with input manufacturers and other farmer organisations, as reflected in the establishment of the Zimbabwe Farmer Agricultural Trust (ZFAT), an alliance between ZFU and CFU; **5)**member capacity building, in particular recruitment and training ; **6)** information management and dissemination through media and magazines; **7)** linking farmers to sources of agricultural credit ;**8)** capacitating farmers to undertake self-help activities, in particular internal saving and credit schemes and income generating activities (IGA); **9)**Lobbying and advocacy in policy formulation and implementation as well as review of trade and regulatory related issues.

Below is a synopsis of some of the specific services provided by FOs.

Service	Objectives	Comments
Contract Farming	Interlock inputs, finance, extension and markets	Very valuable service, the only shortcoming is that farmers' cash needs for operational purposes are not part of the contract farming arrangements. There is also need to put in place

Service	Objectives	Comments
		legislative framework to protect both farmers and the contracting firms.
Insured input credit schemes/packages.	Interlock inputs and finance	Very useful service, again farmers have no access to operational finance
Transportation services	Reduce transportation costs as well as raising income for farmer organizations.	The ZFU used to provide transportation services, which has long stopped. The usefulness of transportation services by a farmer organization depends on the level of competition in the national transport industry at the local rural levels.
Farmer Savings and Lending Groups(S&L)	Improve liquidity in rural areas	This has proved a very valuable service as some S&L create savings that are deposited with banks. On the basis of these savings, some farmers have accessed bank loans. FACHIG still provides this service.
Oil processing (soyabean)	To improve farmer income gains along the value chain by adding value to primary products	This service by FACHIG has stopped but is a very useful service as it narrows the gap between the farmer and the consumer, thereby improving farmer net gains. Oil processing services are currently provided by public (GMB) and private sectors players.
Feedlot scheme (cattle)	To improve farmer access to livestock feeding, extension inputs and markets.	This is a very useful service as it represents a livestock based contract farming arrangement. Farmers are guaranteed management expertise, feeding inputs and markets. The scheme is still under pilot but has potential to guarantee bank credit finance.
Coffee grading and export marketing	To improve farmer incomes along the coffee value addition	This service, provided by farmer growers in Manicaland province, is a very useful service as it proves that farmers can participate at all levels along the crop value chain and in the process improve farmer net incomes.
Research based policy and regulation advocacy	To provide research based advocacy	This service, provided by LMAC, is very useful as it informs value chain actors as well as empower policy makers with research based information for policy formulation and analysis.

FARMER DEMAND FOR SERVICES QUANTIFIED.

Zimbabwe has an estimated total of 1 348 665 farmers across sectors (large, small scale, resettlement and communal), with most of these participating on the market as input buyers and /or product sellers. Farmers participate in different crop and livestock value chains and the Zimbabwe Vulnerability Assessment Committee (ZMVAC,2011) estimated that 9% of farmers produce cotton; 3.5%, tobacco, 80%, maize; 2.9%, sunflower; 0.3% paprika;; 66% groundnuts; 1.5% soya beans; 76 % poultry and 45 % own at least one beast. FAO (2010) highlighted a significant reduction in coffee and tea active producers and estimated active producers at 0.02% for coffee and 0.04% for tea. Majority of Zimbabwe farmers are thus market linked and demand agribusiness services to participate efficiently along crop and livestock value chains.

EXPERIENCES FROM OTHER COUNTRIES.

Experiences from other countries show a range of services provided by farmer organizations along the value chains. It is worth noting that some of these services were made possible through donor support. In particular, the Zambia market information system and the Tanzanian warehouse receipt system were designed with the support of IFAD. Key services provided include; 1) group input procurement; 2) hired group extension ; 3) contractual marketing arrangements with institutions like World Food Programme (WFP) and Nandos; 4) Warehouse Receipt Systems (WRS) for crop storage and credit guaranteeing; 5) use of marketing funds to guarantee bank loans, complemented by insurance against price shocks and other crop damages; 6) on line crop insurance against drought, through commission agencies; 7) SMS based communication systems ; 8) the Farm Ownership Model where farmers process their coffee for a fee (toll processing) and; 9) the Value Chain Development approach where association membership is broadened to include farmers, processors, traders, researchers and consumers.

Regional FOs have adopted different business models, ranging from land leasing, cooperatives, shareholding, contract farming, hybrid and collaborative trade models. Annex 4 provides detailed descriptions on each of the business models. Many FOs in Zimbabwe have already adopted the contracting farming business model with beneficial results. There is need to assess the appropriateness of the other models given the Zimbabwe policy environment. Potential is high for the shareholding model, where farmers buy shares in commercial business concerns; and also the collaborative trade model, also referred to as the farm ownership model, where farmers remain owners of products until almost the end of the value chain, with intermediate processing services being hired from third parties.

VALUABLE SERVICES THAT FOS COULD PROVIDE OR BROKER.

Services proposed below reflect farmer problems and experiences from other countries as discussed above.

Problem	Nature of Service	Arranged at (level)	Preconditions
Agricultural policy framework	i)systematic communication with policy and regulatory institutions 2) research and evidence based advocacy and lobbying	Union Level	1)proposals on preferred communication systems between Unions and state policy institutions prepared and submitted 2)training FO staff on policy analysis, research, advocacy and lobbying
Farmer Organisation Accountability	1)participatory planning, monitoring and evaluation exercises	Union and Association	Systematic planning and Monitoring and Evaluation systems designed.
Agribusiness Advisory Services			
Extension	1)group extension, 2)lead/contact farmer model 3)contract farming 4)broker extension services from private sector	Association	i)farmer training on the cost efficiency of group extension ii) Agribusiness Services Directory that provides information of private, public, NGO extension service providers as well as those firms

Problem	Nature of Service	Arranged at (level)	Preconditions
	5)employ extension monitors/facilitators		that provide contract farming by crop
Finance for input purchase	i)Contract farming 2)Feedlot schemes 3)Use of Marketing Funds to guarantee bank loans, with insurance against price shocks and other crop damages 4)broker/provide services on preparation of bank loan proposals 5) insured credit packages with input manufactures and suppliers	Association	1)farmer training on the concept and establishment of guarantee funds 2) farmer training on risk management strategies, in particular insurance.
Finance for FO operations	1)Agribusiness commercially oriented companies/cooperatives	Association and Union	i) Economic and technical feasibility of commercial subsidiaries along value chains. It is not advisable for FOs to undertake commercially oriented ventures, but farmers are advised to form commercial institution (companies or cooperatives) for commercial activities.
Input Transportation	Group transportation	Association	i)farmer training on group dynamics and economies of scale ii) agribusiness services directory that provides details on rural and urban transporters.
Input markets	Input Market Information	Association and Union	1)agribusiness services directory with information on input markets, location, nature of inputs and cost of major inputs
Poor risk management strategies	On line crop/livestock insurance against drought , through commission agencies;	Association or Union	i) economic and technical feasibility of on- line and other crop and livestock insurance innovations in Zimbabwe.
Limited collaboration with value chain actors	Broadened organization membership to include farmers, processors, traders, researchers and consumers	Association/ or Union	i) lobbying for value actors to appreciate this value chain development approach, this could be initiated through a National Symposium.

Problem	Nature of Service	Arranged at (level)	Preconditions
Post Harvest Handling			
Storage	Warehouse Receipt systems (WRS)	Association or Union	i) economic and technical feasibility along value chains, in particular to determine at what level (district, province, and national) the warehouse system should be established
Value Addition			
Limited participation in value addition activities	1)Toll processing 2) Equity participation in processing/value addition institutions 3)establish a member owned company/cooperative that processes products	Association or Union	i)economic and technical feasibility of toll processing and equity participation in value addition enterprises
Marketing			
Limited market opportunities	Group marketing contracts (WFP, Nandos, supermarkets) Contract farming.	Association	i) accurate information on farmer production and marketing patterns which should be submitted to potential markets with a view to arrange market contracts
High marketing costs	Group marketing	Association	i)Farmer training on group dynamics and economies of scale
Limited market information	SMS based communication systems	Union and Association	1)Agribusiness services directory that locates markets locally, regionally and internationally; supported by weekly/monthly prices information
Information communication technologies			
Costly and untimely communication systems	SMS based communication systems	Association and Union	i) identification and engagement of ICT service providers. ICT providers are many in Zimbabwe and a national tender would be required in the selection process
	Existing	Services	
Extension, inputs, markets	Contract Farming	Association or Union	i) to continue, subject to a legal framework review
Livestock inputs and markets	Feedlot Scheme	Association	i)evaluation of current pilot for consolidation and replication
Liquidity	Savings and Lending	Associations	i)evaluation of current services

Problem	Nature of Service	Arranged at (level)	Preconditions
constraints	Groups		for consolidation and replication

FOs' capacities to deliver identified services

The above table provides a list of services which FOs could choose from, depending on their organizational and technical capacities. The FOs currently face institutional and organizational challenges, limiting their capacity to offer or broker services listed above. Key operational constraints are:-

- 1) Finance: - due to limited member payments, financial constraints will limit FOs capacities to undertake the precondition activities identified above.
- 2) Office infrastructure: -a number of associations do not have the basic tools of trade, in particular offices, vehicles, computers, data bases, websites, information communication technologies (ICT).
- 3) Technical staff: - some associations do not have technical staff. Other institutions have technical staff that need further training on policy analysis, advocacy and lobbying, as well as results based monitoring and evaluation.
- 4) Governance and accountability:-governance accountability is currently enhanced through annual general meetings. However, in the absence of participatory annual planning processes, timely communications systems between board and members and participatory monitoring and evaluations, the effectiveness of annual general meetings remains compromised.
- 5) Limited experiences on other country activities: - most of the services recommended above are based on other countries experiences. Institutional confidence could be improved though familiarization visits to other regional countries, in particular, Zambia, Kenya and Uganda.
- 6) Limited value chain actor dialogue:-most of the services recommended above demand stronger collaboration and cooperation among value chain actors. This would enhance complementarities and synergies among value chain actors for the benefit of further cooperation along the value chains.

OVERALL CONCLUSIONS

- Based on farmer problems discussed above, FOs have potential to provide identified services.
- Constraints faced by FOs will however limit FO capacities to provide identified services. FOs, such as ZFU, CFU, HPC, LMAC and FACHIG that have operational office infrastructure have a greater chance to offer identified services in the short –to medium term. FOs, such as, DOHOPA, MAPA, ZWPFT and ZCFU that do not have operational office infrastructure will need first to operationalise their .office infrastructure (offices, staff, vehicles, communication).

RECOMMENDATIONS

Recommendations below are designed to improve FOs capacities as part of the process towards improved service delivery and brokering.

FO Constraint/limitation	Recommended action
Finance	ZIMACP considers financing : <ul style="list-style-type: none"> • Preparation of the Agribusiness Services Directory • Feasibility study of Warehouse Receipt System, • Feasibility study of toll processing • Feasibility study of online crop insurance • Feasibility study of equity participation in value addition activities • A study to review and assess the potential of Feedlot schemes, contract farming, and tree crops (coffee, tea) for credit guarantee arrangements to participating farmers. • Feasibility study on FO establishing commercial ventures along crop and livestock value chains.
Tools of trade (offices, equipment, vehicles, technical secretariat, etc)	ZIMACP finances computers, data base and website development.
Technical Secretariat	ZIMACP finances on job training on policy analysis, advocacy and lobbying, design of monitoring and evaluation systems through the second-mend of experts and short term refresher courses
Governance and accountability	ZIMACP finances training of governance institutions on leadership, accountability, advocacy and lobbying
Limited experience on other country services provision/brokering by farmer organizations.	ZIMACP finances familiarization visits by FOs to Zambia, Uganda and Kenya.
Limited value chain actors' communication	ZIMACP finances a national symposium on the agribusiness services industry in Zimbabwe.
Limited ICT	ZIMACP finances cell-phone based ICT systems

RECOMMENDED ACTION PLAN

a) Short term activities (priority order)

- Visits to regional countries
- Preparation of the Agribusiness Services Directory
- Value actors hold a national symposium
- FOs individually consider the services recommended
- FOs hold bilateral meetings with ZIMACP on the way forward, with regards FO service preferences.

b) Medium Term activities

- Feasibility studies undertaken as guided by FO preferred services
- Farmer training on group dynamics
- Governance training on leadership, accountability, advocacy and lobbying
- Staff training on policy analysis, advocacy, lobbying and results based monitoring and evaluation.

c) Long term activities.

- Adoption and implementation of services as confirmed viable through feasibility studies.

1.0 INTRODUCTION/CONTEXT

Farmers in Zimbabwe, similar to farmers in other developing countries, operate in fragmented, imperfect markets, poorly supported by poor road, rail, telecommunications, information, power and energy infrastructure. Farmers have realized their weaknesses to face the above operational and policy environment as individuals. Transaction costs to access services along the value chains (extension, training, finance, inputs, transportation, and storage, processing and marketing) are disproportionately high compared to gross farm revenues accruable to an individual farmer.

Farmers have therefore formed associations and unions, herein referred as farmer organizations (FOs), to enhance economies of scale and lower transaction costs when accessing and/or providing agribusiness services. Instead of facing the agribusiness services industry and governance institutions (village, ward, district, province, and national) as individuals, farmers find it cost effective to operate as a group along the value chains.

In this regard, FOs will only remain relevant as long as service costs are lowered through economies of scale along the value chains. Without economies of scale at play, that is, accessing and/or providing services as a group, service costs will remain largely unacceptable to the farmer, irrespective of the value of the service. A great challenge facing FOs is to ensure that farmers have access and take advantage of valuable and affordable services, while continuously advocating and lobbying for policy, infrastructural and regulatory environments that minimize operational costs and maximize revenue. FOs therefore need technical capacity to identify, package and articulate farmers' service needs to the agribusiness services industry, and where economically justifiable, provide missing services.

1.1 BACKGROUND

Members of FOs have reduced or abandoned dues payments for membership and subscriptions, forcing some of these organizations to reduce operations significantly and continue operations on the basis of donor subsidies. The USAID, in collaboration with selected FOs, as part of the Zimbabwe Agricultural Competitiveness Programme (ZMACP), implemented by DAI, conducted this study to identify valuable services that FOs could provide in order to attract new members as well as retain old ones, contributing to vibrant and self-sustaining organizations. The study was also expected to analyze institutional gaps that could derail FOs ambitions to supply and/or broker identified services.

1.2 METHODOLOGY

Study findings were based on the collection and analysis of secondary and primary data. Secondary data was provided by DAI and some of the nine FOs selected for this study. Extensive literature search was also done on the internet. Primary data was collected through interviews with the nine organizations, selected key informants and farmers. Focus group discussions (FGDs) were conducted with groups of farmers, while key informant interviews were held in Harare, Bulawayo and Mutare. The range of key informants included input manufacturers, output markets, farmer organizations, processing agencies and experts with knowledge and experience in different value chains. Annex 1 shows the list of institutions and individuals interviewed. Information from FOs was collected through the use of a semi structured questionnaire. Annex 2 shows the questionnaire administered, annex 3 shows study

references and annex 4 provides a detailed description on business models generally adopted in regional countries.

2.0 STUDY FINDINGS

The study made three major findings, namely: 1) farmers' demand for services; 2) services being provided by FOs and; 3) services that FOs could provide, based on regional and African experiences. Recommendations were then made on activities required before these innovations could be implemented.

2.1 SERVICE DEMAND PATTERNS

Member demand for services was assessed on basis of problems that farmers encounter along the value chains. Table 1 below highlights some of the problems raised during focus group discussions.

Table 1: Farmer concerns (value chain analysis)

	Farmer concerns	Description
1	Macro/Agricultural Policy framework	1.1)non friendly agricultural policy environment (macro, agricultural, trade, marketing regulations (AMA); land tenure, ZINWA, RDCs,) 1.2) poor infrastructure-roads, bridges, electricity-raising production/marketing costs
2	FO governance	2.1)communication between Board and members not transparent and adhoc; farmer issues raised only once a year at Congress 2.2) unclear roles between union, associations and farmer clubs 2.3) no transparent annual plans-unable to enforce Board accountability
3	Production advisory services- (training, extension, finance, input supply).	3.1) limited extension and training opportunities 3.2) costly input transportation 3.3)limited access to finance for operations and farmer daily survival 3.4)incapacity to prepare financial bids as demanded by banks 3.5)inadequate information on input markets (diversity, location and costs) 3.6)inadequate knowledge on livestock, poultry production calendars, disease control dipping calendars etc
4	Post harvest	4.1)limited and inappropriate storage facilities
5	Value addition	5.1)limited options to participate in value addition (grading, processing)
6	Output marketing	6.1)limited knowledge on viable markets(locally, regionally, internationally) 6.2)poultry products sold sporadically in small quantities 6.3)poultry farmers face import competition 6.4)low livestock prices due to exploitative middlemen/traders 6.5)tea sold as green leaf to processing companies at non competitive prices

	Farmer concerns	Description
		6.6) coffee exported as green coffee due to inadequate processing facilities
		6,7) no functional producer and marketing associations for bananas and tea , putting producers at the mercy of buyers
		6.4) late payments for wheat, grains and oilseeds products
		6.4) inappropriate vehicles for transportation of perishables
		6.5) low prices due to over-flooding at Mbare Musika
		6.6) low cotton prices
		6.7) high transportation costs for output marketing
		6.8) no representation at Mbare Musika where makoronyera(middlemen)short -change farmers
		6.9) limited export opportunities for horticultural products
		6.10) limited knowledge on export/import regulations
		6.11) limited information on input and output markets
7	Information technologies	7.1) costly and untimely communication systems

Source: Focus Groups

2.1.1 FARMER DEMAND QUANTIFIED.

All farmers who produce cash crops as well as those who produce crops for home consumption but buy modern inputs (seeds, fertilizer, labour) from the market will demand various services to participate along the value chains.

2.1.2 ZIMBABWE FARMING STRUCTURE.

Zimbabwe now has a farming structure comprised of different farmer groups as shown in table 2:

Table 2: Zimbabwe Agrarian Structure (2009)

Description	Estimated number of households
Communal area	1,100,000
Old resettlement	75,697
A1 Resettlement	145,775
Small Scale Commercial	8,000
A2 Resettlement	16,386
Large scale commercial (Black)	1,440
Large Scale Commercial (White)	1,377
Total	1,348,665

Source: V.Vudzijena (2009 World Bank Report on Agrarian Structure Baseline Study)

Table 3: Cash crop production trends (2010/2011 season)

Crop	Proportion of households growing %	No. of households growing out of 1,348,665)
Soya beans	1.5	20,230
Tobacco	3.5	47,203
Cotton	9.0	121,380
Paprika	2.3	31,019
Sunflower	2.9	39,111
Coffee*	0.02	206
Tea*	0.04	532

Crop	Proportion of households growing %	No. of households growing out of 1,348,665)
Cattle	45	606 899
Poultry (free range)	76	1 024 985

ZIMVAC Report, September, 2011; 3rd column –own calculations.

Coffee and tea are very low after the land reform and economic meltdown. Smallholder coffee producers dropped from 3400 at peak to now 200; while large scale producers dropped from 125 to now 6, totaling 206. The tea and coffee enterprises are on the rebound now, with the hope to reach pre land reform figures again.

Table 4: Cereal crop production (2010/2011)

Crop	Proportion of households growing%	No of households growing out of 1,348,665
Maize	80	1,078,932
Wheat	2.7	36,414
Sorghum	20	269,733
Finger millet	6	80,920
Pearl millet	7	94,407*

ZIMVAC Report, September, 2011; * no totals are calculated to avoid double counting.

Despite the fact that relatively few farmers produce cereals for the market, majority of maize producers procure inputs off the markets, particularly seed and fertilizers. In this regard, cereal producers, particularly, maize and wheat producers are market bonded and will demand agribusiness services.

Table 5: Other Crops

Crop	Proportion of households growing%	No of households growing (out of 1,348,665
Irish potatoes and yams	1	13,487
Sweet potatoes	8	107,893
Cow peas	15	202,300
Groundnuts	45	606,899
Roundnuts	23	310,193
Sugar beans	4	54,947

ZIMVAC Report, September, 2011; own calculations.

Table 6: Average Fertilizer Use

Type	Proportion (%) of households using	No of households growing(% of 1,348,665
Basal	29	391,113
Top dressing	32	431,573

ZIMVAC Report, September, 2011, own calculations

Tables 5 and 6 above, particularly table 6, confirm that a significant portion of Zimbabwe farmers purchase production inputs off the market.

2.2. SERVICES PROVIDED BY DIFFERENT FOS

Service provision differed by farmer organisation and depended on available technical and financial capacities. Despite these differences, farmer organizations provided generic services that included; 1) farmer training/or facilitation, 2) extension services/or facilitation, 3) linking farmers to input and output markets, in particular contract farming; 4) collaborating with input manufacturers and other farmer organisations, as reflected in the establishment of the Zimbabwe Farmer Agricultural Trust (ZFAT), an alliance between ZFU and CFU; 5) member capacity building, in particular recruitment and training ; 6) information management and dissemination through media and magazines; 7) linking farmers to sources of agricultural credit ; 8) capacitating farmers to undertake self-help activities, in particular internal saving and credit schemes and income generating activities (IGA); 9) Lobbying and advocacy in policy formulation and implementation as well as review of trade and regulatory related issues.

Below is a synopsis of some of the specific services provided by FOs.

Service	Objectives	Comments
Contract Farming	Interlock inputs, finance, extension and markets	Very valuable service, the only shortcoming is that farmers' cash needs for operational purposes are not part of the contract farming arrangements. There is also need to put in place legislative framework to protect both farmers and the contracting firms.
Insured input credit schemes/packages.	Interlock inputs and finance	Very useful service, again farmers have no access to operational finance
Transportation services	Reduce transportation costs as well as raising income for farmer organizations.	The ZFU used to provide transportation services, which has long stopped. The usefulness of transportation services by a farmer organization depends on the level of competition in the national transport industry at the local rural levels.
Farmer Savings and Lending Groups(S&L)	Improve liquidity in rural areas	This has proved a very valuable service as some S&L create savings that are deposited with banks. On the basis of these savings, some farmers have accessed bank loans. FACHIG still provides this service.
Oil processing (soyabean)	To improve farmer income gains along the value chain by adding value to primary products	This service by FACHIG has stopped but is a very useful service as it narrows the gap between the farmer and the consumer, thereby improving farmer net gains. Oil processing services are currently provided by public (GMB) and private sectors players.
Feedlot scheme (cattle)	To improve farmer access to livestock feeding, extension inputs and markets.	This is a very useful service as it represents a livestock based contract farming arrangement. Farmers are guaranteed management expertise, feeding inputs and markets. The scheme is still under pilot but has potential to guarantee bank credit finance.
Coffee grading and export marketing	To improve farmer incomes along the	This service, provided by farmer growers in Manicaland province, is a very useful service as

Service	Objectives	Comments
	coffee value addition	it proves that farmers can participate at all levels along the crop value chain and in the process improve farmer net incomes.
Research based policy and regulation advocacy	To provide research based advocacy	This service, provided by LMAC, is very useful as it informs value chain actors as well as empower policy makers with research based information for policy formulation and analysis.

2.3 SERVICE VIABILITY

Service viability has been assessed on the basis of summer and winter input packages arranged between Windmill and Zimbabwe Farmers Commercial Union (ZCFU) in 2009/2010 and 2010/2011 respectively. These packages are examples of contract farming that arrangements that farmers value. Both packages were worth \$2 million, of which to date only \$100,000 has been recovered.

2.3.1 THE WINTER WHEAT INPUT PACKAGE

ZCFU farmers produced winter wheat under contract with Muga Fruit in 2011. An input package where farmers received fertilizers on credit involved five players. ZCFU vetted and linked farmers to Windmill. Windmill provided fertilizers to selected farmers through Muga Fruit, the contracting firm. Jupiter insurance insured the whole packager. Loan repayments would be deducted by Muga Fruit upon wheat delivery. Muga Fruit would pay Windmill Private Limited.

Farmers delivered wheat to Muga Fruit at the end of the season. Unfortunately, Muga Fruit did not pay both farmers and Windmill. Jupiter, the insurer for this whole package, reportedly got liquidated before the deal had been finalized. **This service confirms that farmers are prepared to pay for services; provided they have access to credit arrangements and payments are tied to harvests.**

2.3.2 THE SUMMER CROP INPUT PACKAGE

The summer package involved four players. Agriseeds wanted to give maize seed to farmers on credit. Farmers requested to get an input package that included fertilizer. Agriseeds negotiated with Windmill on behalf of farmers so that fertilizer would be part of the package. A memorandum of understanding (MOU) was signed between Agriseeds and ZCFU to the extent that farmers would pay on a monthly basis. Monthly payments were to be done through ZCFU. Farmers have long since stopped payments and ZCFU seems unable to recover money from its members. This example suggests two possibilities. First, that farmers have no capacity to pay for services. Second, that farmers do not always adhere to contractual terms. ZCFU is convinced farmers have capacity to pay. Failure to pay is viewed as reflection of the donor syndrome where farmers are used to fee handouts. What is required to solve this puzzle is to calculate farm budgets (as opposed to crop budgets) as this will show to what extent crop income covers household costs.

2.3.3 Tobacco Merchant Credit Packages

Windmill supports tobacco farmers with fertilizer on the guarantee of tobacco merchants. Windmill has not suffered any defaults under such tobacco packages, largely because the tobacco merchants are responsible for repayment to Windmill. The tobacco merchant guarantees repayments to Windmill and usually pays Windmill on behalf of farmers, indicating the merchant's confidence on the farmer commitment to pay back.

2.3.4 THE FEEDLOT SCHEME IN MANGWE DISTRICT

To improve livestock quality before slaughter, the Matabeleland Agribusiness Chamber introduced and is piloting the concept of feedlots. The innovation involves the construction of a feedlot where farmers are free to put their livestock for pen fattening purposes at a fee. Management of the feedlot is done by hired livestock experts, while feeding inputs are provided by agribusiness actors, in particular abattoirs. The objective of this scheme is to improve the quality of livestock before cattle are slaughtered. Verbal discussions with Matabeleland Agribusiness Chamber officials confirmed that this package is viable based on the quality of finished stock. This model could be more appealing if it could introduce a credit element, where banks could be influenced to lend to farmers on the basis of projected livestock returns at sale. An insurance cover would be part of such a deal to minimize bank exposure in the event cattle die before sell.

2.4 OTHER COUNTRY EXPERIENCES

Below are selected services being offered by FOs in other countries. It is worthwhile noting that some of these services were made possible through donor support. In particular, the Zambia market information system was designed with the support of IFAD and the Tanzanian warehouse receipt system was also started with IFAD funding. The Uganda Kapchorwa experience is unique in that economies of scale are being realized both at extension, fertilizer procurement and output deliveries, with all activities being done in a group approach. The Mali Cereal Farmers Association experience is also unique as it tries to solve the liquidity constraints facing farmers through its framework for advanced payments. The Uganda Oilseeds Value Chain Development experience is also unique as it links all value chain actors in one association. Equally unique is the Uganda Farm Ownership Model: which solves the farmer demand to add value through toll processing, similar to the coffee experience in Mutare. The only difference is with respect to the fact that the processing plant in Uganda is privately owned while in Mutare it is farmer owned. The Kenya-ICT product (the M-pesa scheme) sounds equally innovative as it enabled farmers to insure on line as little as one kg of maize seed or fertilizer against drought.

Regional FOs have adopted different business models, ranging from land leasing, cooperatives, shareholding, contract farming, hybrid and collaborative trade models. Annex 4 provides detailed descriptions on each of the business models. Many FOs in Zimbabwe have adopted the contracting farming business model with beneficial results. There is need to assess the appropriateness of the other models given the Zimbabwe policy environment. Potential is high for the shareholding model, where farmers buy shares in commercial business concerns; and also the collaborative trade model, also referred to as the farm ownership model, where farmers remain owners of products until almost the end of the value chain. Intermediate processing services are hired from third parties.

Table 7: Other Country Experiences.

Country	Innovation
Uganda:Kapchorwa Commercial Farmers Association-	-grew from 27 to 5,000 members in ten years; -fertilizer procurement is done in groups - hires own extension workers. -has delivery contracts with breweries and WFP -established a warehouse receipt system for its members. Farmers deposit products for storage at a fee; while products are under storage, farmers can get bank credit on the

Country	Innovation
	guarantee of receipt issued by the warehouse. Farmers are not only enabled to access bank finance but can market products as and when prices firm up.
The Uganda Nyabvumba United farmers group	-has contracts to supply to Nandos Fast Foods as a group. This does not only guarantee markets, but improves farmers' incomes as it eliminates middlemen.
Mali Cereal Farmers Association	<ul style="list-style-type: none"> -developed a mechanism of advanced payments, -to help its members address the problem of accessing working capital -farmers receive loans against a delivery commitment to association. -association then requests a loan from a financial institution based on the aggregated credit needs of its members, -uses its marketing fund as a guarantee. -an insurance fund has also been established to cover possible damages and price shocks -products sold direct to wholesalers at farm gate <p>The biggest challenge raised by farmers is working capital. The Malian experience is useful in that regard, in particular the concept of a market guarantee fund, supported by an insurance package.</p>
Kenya-ICT product (the M-pesa scheme)	<ul style="list-style-type: none"> -The scheme offers savings, domestic money transfer, and other services through local agents on commission; -Building on the m-pesa facility, a new insurance product was developed -farmers are enabled to insure as little as one kg of maize seed or fertilizer against drought -customers buy the policy through local- agro-vets and receive confirmation of purchase as well as any payouts through the M-pesa. <p>Farmers' ability to insure products on line is an innovation worth noting.</p>
Zambia Market information : ZNFU 4455	<ul style="list-style-type: none"> -designed with support of IFAD, -to provide market price information -farmers send request to number 4455 -system required information -Each message costs 15cents -The system works for 14 commodities, and lists over 180 traders. <p>This represents an innovation which could improve information and communication system between farmers and management boards.</p>
The web based e-Choupal information system –INDIA.	<ul style="list-style-type: none"> -Provides information on farming practices, market prices, and district weather forecasts; - also used for buying and selling produce, and for procuring farm inputs. <p>This service has same value as the Zambian one, but more interesting is the provision of weather forecasts. .</p>
The trading platform ESOKO- Ghana	-offers real time prices for more than 80 commodities from 400 markets across west Africa.

Country	Innovation
The Tanzanian warehouse receipt system	-started with IFAD funding -allows farmers to store products, access credit and sell when prices are favourable
The Farm Ownership Model : Uganda Coffee Union	-farmers own their coffee throughout their various stages of processing -union does not buy off farmers -but acts as a process facilitator -instead of selling coffee to processors, farmers now simply pay a fee for processing or milking and retain the processed coffee. This model enables the farmer to move up the value chain and in the process enables higher income levels. .
Oilseeds Value Chain Development –Uganda	-formed Oilseeds Producers and Processors Association-1999 -membership includes farmers, processors, traders, researchers and consumers Services include: -provides seeds -trains farmers on price bargaining -involved in production, processing, marketing and research -farmers have own small enterprises for oilseeds marketing and processing -others produce vegetable oils using hand mills (a ram presser) This service enables collaborative efforts among all value chain actors, creating a win-win situation for the actors.
Zambia's National Farmer Organization Develops SMS-Based Service	-the network provider offered several hundred half-price mobile phones to farmers. -money for technical support was sourced elsewhere. -. operations are supervised by a Market/trade Information Administrator at ZNFU's head office in Lusaka,

2.5 VALUABLE SERVICES THAT FOS COULD PROVIDE OR BROKER.

Services proposed below reflect farmer problems and the experiences from other countries as discussed above.

Problem	Nature of Service	Arranged at (level)	Preconditions
Agricultural policy framework	i) systematic communication with policy and regulatory institutions 2) research and evidence based advocacy and lobbying	Union Level	1)proposals on preferred communication systems between Unions and state policy institutions prepared and submitted 2)training FO staff on policy analysis, research, advocacy and lobbying

Problem	Nature of Service	Arranged at (level)	Preconditions
FO Accountability	1)participatory planning, monitoring and evaluation exercises	Union and Association	Systematic planning and monitoring and evaluation (M&E) systems designed.
Agribusiness Advisory Services			
Extension	1)group extension, 2)lead/contact farmer model 3)contract farming 4)broker extension services from private sector 5)extension monitoring/facilitation	Association	i)farmer training on the cost efficiency of group extension ii) Agribusiness Services Directory that provides information of private, public, NGO extension service providers as well as those firms that provide contract farming by crop
Finance for input purchase	i)Contract farming 2)Feedlot schemes 3)Use of Marketing Funds to guarantee bank loans, with insurance against price shocks and other crop damages 4)broker/provide services on bank loan proposals 5) insured credit packages between FO and input manufactures and suppliers	Association	1)farmer training on the concept and establishment of guarantee funds 2) farmer training on risk management strategies, in particular insurance.
Finance for FO operations	1)Agribusiness commercially oriented companies/cooperatives	Association and Union	i) Economic and technical feasibility of commercial subsidiaries along value chains. It is not advisable for FOs to undertake commercially oriented ventures, but farmers are advised to form commercial institution (companies or cooperatives) for commercial activities.
Input Transportation	Group transportation	Association	i)farmer training on group dynamics and economies of scale ii) agribusiness services directory that provides details on rural and urban transporters.

Problem	Nature of Service	Arranged at (level)	Preconditions
Input markets	Input Markets Information	Association and Union	1) agribusiness services directory with information on input markets, location, nature of inputs and cost of major inputs
Poor risk management strategies	On line crop insurance against drought, through commission agencies;	Association or Union	i) economic and technical feasibility of on- line and other crop and livestock insurance innovations in Zimbabwe.
Limited collaboration with value chain actors	Broadened organization membership to include farmers, processors, traders, researchers and consumers	Association/ or Union	i) lobbying for value actors to appreciate this value chain development approach, this could be initiated through a National Symposium.
Post Harvest Handling			
Storage	Warehouse Receipt systems (WRS)	Association or Union	i) economic and technical feasibility along value chains, in particular to determine at what level (district, province, and national) the warehouse system should be established
Value Addition			
Limited participation in value addition activities	1) Toll processing 2) Equity participation in processing/value addition institutions 3) establish a member owned company that processes products	Association or Union	i) economic and technical feasibility of toll processing and equity participation in value addition enterprises
Marketing			
Limited market opportunities	Group marketing contracts (WFP, Nandos, supermarkets)	Association	i) accurate information on farmer production and marketing patterns which should be submitted to potential markets with a view to arrange market contracts
High marketing costs	Group marketing	Association	i) Farmer training on group dynamics and economies of scale
Limited market information	SMS based communication systems	Union and Association	1) Agribusiness services directory that locates markets locally, regionally and internationally; weekly/monthly prices, quality, health and other standards

Problem	Nature of Service	Arranged at (level)	Preconditions
Information communication technologies			
Costly and untimely communication systems	SMS based communication systems	Association and Union	i) identification and engagement of ICT service providers. ICT providers are many in Zimbabwe and a national tender would be required in the selection process
	Existing	Services	
Extension, inputs, markets	Contract Farming	Association or Union	i) to continue, subject to a legal framework review
Livestock inputs and markets	Feedlot Scheme	Association	i)evaluation of current pilot for consolidation and replication
Liquidity constraints	Savings and Lending Groups	Associations	i)evaluation of current services for consolidation and replication

3.0 SWOT ANALYSIS

3.1 FACHIG

Strength

- has operated in the area since the 1994
- both the Board and members have significant experience on crop and livestock production
- has officers decentralized to the district levels
- has well educated staff
- members have received significant training on group dynamics and project activities. .
- membership is dominated by women
- has a reasonably well equipped office-office, vehicles, computers
- membership organized in a bottom up approach, starting at the village to the provincial level
- FACHIG has sustained donor financing since formation

Weaknesses

- fully funded by donors.
- donor funding sometimes influences the mindset and plan of action
- oorganization formed to achieve government and donor objectives
- members not contributing to the financing of FACHIG
- difficult for members to demand Board accountability
- no effective data base
- no exact information on paid up membership
- no financial capacity to implement planned activities.

Opportunities

- worsening livelihoods risks due to HIV/AIDS and climate change
- improving macroeconomic environment
- low productivity on crop and livestock activities
- limited member participation on value addition activities
- difficulties faced by members in accessing working capital
- poor services by both government and the private sector
- experience obtained when FACHIG processed soyabean on behalf of farmers. This activity has since been terminated.
- Membership that farms crops and livestock

Threats.

- donor finance is not always dependable
- non systematic farmer demand identification, packaging and articulation mechanisms
- no systems to officially collaborate with agribusiness service providers.
- no clear vision on when and how ,members are expected to participate at what stage in the crop and livestock value chains
- no clear accountability in the operational direction and financing of ZFU, its apex board. .

3.2 ZFU

Strength

- operates countrywide
- has vast experience on farmer organizational issues
- has many associations affiliated to it
- well organized and has an educated secretariat
- has tools of trade, in particular office infrastructure
- significant knowledge on crop and livestock value chains
- shares platform with CFU, with tremendous expertise
- collaborates effectively with donor, NGO and government institutions
- is partly donor funded
- is partly funded by members and own commercial activities.

Weaknesses

- donor funding sometimes influences the mindset
- organization not member- owned as reflected by dwindling members
- members not contributing much to the operations of ZFU
- no effective data base
- no accurate information on paid up members
- no statistics on the production potential of members
- inadequate representation in some districts
- membership organized at individual farmer level, reducing visibility of group concept/philosophy at club / village level.
- difficult for members to demand accountability due to limited participatory planning
- no financial capacity to implement planned activities.

Opportunities

- worsening livelihoods risks due to HIV/AIDS and climate change
- low productivity on crop and livestock activities.
- macroeconomic improvements
- improved political environment
- limited member participation on value addition activities
- difficulties faced by members in accessing working capital
- poor services by both government and the private sector
- experience obtained when ZFU implemented a transport services project. The project has since been terminated.
- membership that farms seasonal and tree crops, as well as livestock

Threats.

- worsening member dislike for the institution, reflected through low subscriptions
- low financing capacity by members
- low financial capacity to undertake planned projects
- non systematic farmer demand identification, packaging and articulation mechanisms
- limited interaction with agribusiness service providers
- limited secretariat skills for policy research and analysis

- not proactive but reactive and reacts only when problems arise
- advocacy demands being proactive, which demands research, analysis and foresight
- limited collaboration with government as shown by conflicts between AMA, RDCs and ZFU.
- inadequately functioning commodity associations.

3.3 ZCFU

Strength

- operates countrywide
- has vast experience since 1990
- significant knowledge on crop and livestock value chains
- has all types of farmers as its members
- collaborates well with donor, NGO and government institutions

Weaknesses

- currently operates on an “empty” purse
- organization not member owned- as reflected by dwindling member payments
- no exact information on paid up membership-data base
- poor financial administration as reflected by fraudulent activities associated with the previous board.
- inadequate office infrastructure , with some former officers clinging on to vehicles
- majority of staff resigned
- no operational secretariat currently

Opportunities

- worsening livelihoods risks due to HIV/AIDS and climate change
- low productivity on crop and livestock activities.
- macroeconomic improvements
- improved political environment
- limited member participation on value addition activities
- difficulties faced by members in accessing working capital
- poor services by both government and the private sector
- failure of input packages with Windmill
- membership that farms seasonal and tree crops, as well as livestock.

Threats.

- financial incapacity
- declining membership
- continued lack of technical secretariat
- non systematic farmer demand identification, packaging and articulation mechanisms
- limited interaction with agribusiness service industry and government.

- poor lobbying and advocacy capacity
- past history of fraudulent activities by the previous Board.

3.4 HPC

Strength

- member financed
- significant knowledge on horticultural value chains
- significant respect within government and agribusiness circles.
- membership comprised of diverse enterprises, with potential to learn from each other.
- educated secretariat
- corporate members who still contribute membership fees.
- capacity enhanced through ZMACP staff secondment

Weaknesses

- thin on staff
- no sub-national representation
- no staff at sub national levels

Opportunities

- worsening livelihoods risks due to HIV/AIDS and climate change
- low productivity on crop and livestock activities.
- macroeconomic improvements
- improved political environment
- limited member participation on value addition activities
- difficulties faced by members in accessing working capital
- poor services by both government and the private sector
- demand by DOHOPA and MAPA for horticultural advisory services.

Threats.

- limited financial capacity
- members from smallholder sector (DOHOPA/MAPA) not paying membership subscriptions yet
- non systematic farmer demand articulation mechanisms-smallholder sector
- limited capacity to analyze impact of policies on horticulture development
- no representation at sub national levels

3.5 LMAC

Strength

- board members have extensive knowledge in the livestock industry
- membership is voluntary
- livestock value chains all represented
- committed secretariat

- secretariat with adequate knowledge on livestock value systems
- capacity enhanced through ZIMACP second-mend

Weaknesses

- limited finance to recruit adequate personnel
- government participation ad hoc

Opportunities

- rreviving agricultural and macroeconomic sectors
- iincreasing importance attached to livestock in survival strategies
- EU exports resumption potential
- wworsening livelihoods risks due HIV/AIDS and climate change

Threats.

- limited finance
- reduced participation by Ministry officials
- high free rider risks because information will be accessed by those who don't contribute to its production.

3.6 MAPA

Strength

- registered
- owns two buildings, located at a rural shopping centre, away from Murehwa town
- dedicated management committee
- highly visible to local farmers

Weaknesses

- limited operating capital
- no secretariat
- management committee members, who double as governance and secretariat
- no office equipment, vehicles or ICT, no data base, no website
- one of the offices currently used as local clinic
- the other office is lying idle
- no skills, experience, knowledge on advocacy, lobbying and other country experiences
- no vision on FABOs accountability and potential

Opportunities

- improved dietary knowledge increasing demand for horticulture
- worsening rural poverty levels due to HIV/AIDS and climate change

Threats

- no office infrastructure
- limited member financial contributions
- ad hoc donor support
- limited technical capacity

3.7 DOHOPA

Strength

- registered
- management committee committed to see DOHOPA succeed
- visible in the local area
- known by some value chain actors, has recently linked members to microfinance institution that is financing broiler production.

Weaknesses

- no office infrastructure-offices, vehicles, computers, secretariat
- lack of a technical secretary limits the technical, lobbying and advocacy capacity
- board members are double engaged as board and as office executives.
- low capacity to enforce member payments
- no data base,

Opportunities

- the improving macro-economic environment
- increasing importance attached to vegetables in modern diets
- seasonal vegetable shortages at Mbare
- proximity to Harare urban
- dominance of horticulture on livelihoods in Domboshava

Threats.

- limited finance
- lack of operational and office infrastructure
- limited remuneration for board activities.

3.8 ZWPFT

Strengths

- visionary leadership
- the institution is registered
- the institution has opened a bank account.
- committed voluntary staff

Weaknesses

- no finance
- no office space
- no vehicles
- no poultry processing facilities
- No ICT -computers, internet, website,

Opportunities

- favourable government policy that discourages imports through high duty charges
- current local market deficit
- the UNWTO meeting later this year

Threats

- donor syndrome within membership
- high bank charges for productive loans
- AMA regulatory statutes, which may discourage members production

3.9 CFU

Strength

- operates countrywide
- has vast experience on farmer organizational issues
- has many associations affiliated to it
- well organized and has an educated secretariat
- has tools of trade, in particular office infrastructure
- significant knowledge on crop and livestock value chains
- shares platform with ZFU, with tremendous exposure nationwide
- collaborates effectively with donor, NGO and government institutions
- is member funded

Weaknesses

- membership decline from pre land reform
- relatively few paid up members

Opportunities

- improving macro-economy
- stable political environment

Threats

- continued land reform and resettlement

3.7. FAMER ORGANISATIONS' CAPACITY STATUS

Table 8 summarizes the institutional capacity of the member institutions for the delivery of demanded services:

Table 8: Institutional Capacities

Institution	Elected Board	Secretariat	Office	Financing	Observations
ZFU	Yes	Yes	Owned	Donor/member	Has potential for better service delivery
ZCFU	Yes	No	-	Nil	Has no technical capacity at present- difficult to provide services in the current state of affairs
HPC	Yes	Yes	Rented	Members	Has potential for better service delivery
CFU	Yes	Yes	Owned	Members	Satisfactory operations
LMAC	Yes	Yes	Rented	Members	Has potential to provide better services-the registration issue needs to be looked at.
MAPA	Yes	No	Owned	Nil	has no technical capacity and Board members operate partly on a voluntary basis. The office infrastructure needs to be established as a precondition to effective service delivery.
DOHOPA	Yes	No	No	Nil	Has no technical capacity and Board members operate partly on a voluntary basis. The office infrastructure needs to be established as a precondition to effective service delivery
ZWPT	No	Voluntary	NO	Nil	Needs an organizational and institutional lift up first (grassroots membership structure, office tools of trade),
FACHIG	Yes	Yes	Yes	Donor	Has potential to

Institution	Elected Board	Secretariat	Office	Financing	Observations
					provide better services and with improvements on data base, FACHIG could pilot a number of recommended services.

3.8 FO CAPACITY TO DELIVER IDENTIFIED SERVICES

The above table provides a list of services which FOs could choose from, depending on their organizational and technical capacities. The FOs currently face institutional and organizational challenges, limiting their capacity to implement selected services from the above list. Key operational constraints are:

- 1) Finance- due to limited member payments, financial constraints will constraint FOs to undertake the precondition activities identified above.
- 2)Office infrastructure -a number of associations do not have the basic tools of trade, in particular offices, vehicles, computers, data bases, websites, information communication technologies(ICT).
- 3) Technical secretariat- some associations do not have technical secretariats. Other institutions have technical secretariats which need further training on policy analysis, advocacy and lobbying, as well as results based monitoring and evaluation.
- 4) Governance and accountability-governance accountability is currently enhanced through annual general meetings. However, in the absence of participatory annual planning processes, timely communications systems between board and members and participatory monitoring and evaluations, the effectiveness of annual general meetings may be compromised.
- 5) Limited experiences on other country activities- most of the services recommended above are based on other countries experiences. Institutional confidence could be improved though familiarization visits to other regional countries, in particular, Zambia, Kenya and Uganda.
- 6) Limited value chain actor dialogue-most of the services recommended above demand stronger collaboration and cooperation among value chain actors. This would enhance complementarities and synergies among value chain actors for the benefit of further cooperation along the value chains.

4.0 OVERALL CONCLUSIONS

- Based on farmer problems discussed above, FOs have potential to provide identified services.
- Constraints faced by FOs will however limit FO capacities to provide identified services. FOs, such as ZFU, CFU, HPC, LMAC and FACHIG that have operational office infrastructure have a greater chance to offer identified services in the short –to medium term. FOs, such as, DOHOPA, MAPA, ZWPFT and ZCFU that do not have operational office infrastructure will need first to operationalise their office infrastructure (offices, staff, vehicles, communication).

4.1 RECOMMENDATIONS

Recommendations below are designed to improve FO capacity as part of the process towards service delivery.

FO Constraint/limitation	Recommended action
Finance	<p>ZIMACP considers financing :</p> <ul style="list-style-type: none"> • Preparation of the Agribusiness Services Directory • Feasibility study of Warehouse Receipt System, • Feasibility study of toll processing • Feasibility study of online crop insurance • Feasibility study of equity participation in value addition activities • A study to review and assess the potential of Feedlot schemes, contract farming, and tree crops (coffee, tea) for credit guarantee arrangements to participating farmers. • Feasibility study on FO establishing commercial ventures along crop and livestock value chains.
Tools of trade (offices, equipment, vehicles, technical secretariat, etc)	ZIMACP finances computers, data base and website development.
Technical Secretariat	ZIMACP finances on job training on policy analysis, advocacy and lobbying, design of monitoring and evaluation systems through the second-mend of experts and short term refresher

FO Constraint/limitation	Recommended action
	courses
Governance and accountability	ZIMACP finances training of governance institutions on leadership, accountability, advocacy and lobbying
Limited experience on other country services provision/brokering by farmer organizations.	ZIMACP finances familiarization visits by FOs to Zambia, Uganda and Kenya.
Limited value chain actors' communication	ZIMACP finances a national symposium on the agribusiness services industry in Zimbabwe.
Limited ICT	ZIMACP finances cell-phone based ICT systems

4.1.1 RECOMMENDED ACTION PLAN

a) Short term activities (priority order)

- Visits to regional countries
- Preparation of the Agribusiness Services Directory
- Value actors hold a national symposium
- FOs individually consider the services recommended
- FOs hold bilateral meetings with ZIMACP on the way forward, with regards FO service preferences.

b) Medium Term activities

- Feasibility studies undertaken as guided by FO preferred services
- Farmer training on group dynamics
- Governance training on leadership, accountability, advocacy and lobbying
- Staff training on policy analysis, advocacy, lobbying and results based monitoring and evaluation.

c) Long term activities.

- Adoption and implementation of services as confirmed viable through feasibility studies.

ANNEX 1: PEOPLE AND ORGANIZATIONS MET.

Name	Organization	Position
S.J. Choga	FACHIG	Programme Manager
T. Mupetesi	FACHIG	Director
S P Muchadondida	FACHIG	Livelihoods Coordinator
E Mukove	FACHIG	Finance and Administration Manager
S. Mupetesi	FACHIG	Accounts Clerk
B.Sandamu	HPC	Chief Executive
K. Raymond	HPC/Southern Flowers	Production Manager
D.Mabvute	HPC	Agribusiness Services Consultant
K.Muvandiro	HPC	-
N. Jaravazi	HPC	
F. Makoto	-	Consultant
R. Gunundu	HPC/Interfresh	Director
Z. Nyamusara	HPC/ZN Fruits	Director
Chirawu Lovewell	Ministry of Agriculture	Economist
Agnes Mugava	Ministry of Agriculture	Economist
S.Tsimba	ZCFU	Acting Director
J.S Mapira	ZCFU	Vice President
L.Mataya	ZCFU	Economist
B. Mungure	ZCFU	Information Officer
C.Makombe	ZCFU	Secretary General
Chabikwa	ZCFU	President
E.Ndhovu	ZCFU Commodities	Vice President
Mrs Gumede	ZCFU	
T. Chinyemba	DOHOPA	Chairlady
C.Marimo	DOHOPA	Secretary
C. Sukume	LMAC	ZIMACP Consultant
M. Beffa	LMAC/LIT	General Manager
S. Beffa	LMAC	Administrator
V. Chigavazira	LMAC	Officer
T. Musarara	Grain Millers Association	Chairperson
M. Masuku	MABC	Coordinator
C.Malaba	ZFAT/Livestock Commodity Association	Chairperson
Mr Prince	ZFU	Economist
Mrs Makomva	ZFU	Marketing
E. Nwanza	ZFU Matabeleland North	Provincial Coordinator
Mr Nyati	ZFU	First Vice President
Dr Moyo	Department of Veterinary Services	Provincial Head

Name	Organization	Position
C. Wamambo	Cold Storage Company	Livestock Director
O. Dobbie	Windmill	Marketing Officer
A. Mandizha	GMB	General Manager
M. Parirenyatwa	GMB	Deputy General Manager
G. Buka	Cotton Ginners Association	Director General
R.Mano	Agriculture Finance Working Group	Chairperson
E.Msiwwa	ZNSCA	-
Mr Chibanda	AMA	-
Mrs Teveral	ZWPT	Director
M.Carrie-Wilson	CFU	Legal Affairs Manager
M. Chinyadza	MAPA	Marketing Secretary
D.Mudavanu	MAPA	Member
R.Madzinga	MAPA	Member
N.Murombo	MAPA	Chairperson
F.Mungayo	MAPA	Secretary
D.Mfote	FAO	Deputy Country Rep.
Mr Kariri	FAO	Livestock Expert
Mr Mbendani	Mutare Poultry Producers Association	Chairman
J.Rushinga	Mutare Coffee Mill	Manager
D.Mugonyora	Coffee Producers Association	Chairperson-Honde Valley
	Tea Producers Association	Chairperson-Honde Valley
	Banana Producers Association	Chairperson-Honde Valley

ANNEX 2: FARMER ORGANIZATIONS CAPACITY BUILDING QUESTIONNAIRE

Table1: Farmer constraints and services provided (value chain analysis)

	Farmer Concerns	Service/s provided to address the concern	Service Provision mechanism/approach	Farmer payment method for service delivery	Preferred service delivery mechanism
1	<p>Agricultural Policy Framework</p> <p>1.1.Non friendly policy environment (macro and agricultural-national budget support, trade and marketing regulations, control on levies, export controls, tenure,ZINWA,etc</p> <p>1.2. Coordination mechanisms with government limited</p> <p>1.3 unsatisfied with the commitment and efficiency of government technical departments</p> <p>1.4 poor infrastructure(roads, bridges, electricity, etc) raising production/marketing costs</p>				
2	<p>Organization Governance</p> <p>2.1. Defacto separation of farmers from Board and Management</p> <p>2.2. Farmers issues raised only once/year at Congress</p> <p>2.3. Communication systems between Board and farmers not transparent and adhoc</p> <p>2.4.Organisation activities reflect donor</p>				

	Farmer Concerns	Service/s provided to address the concern	Service Provision mechanism/approach	Farmer payment method for service delivery	Preferred service delivery mechanism
	and not farmers urgent needs 2.4. Unclear roles between Union, Association and Club levels 2.5. Inability to enforce Board Accountability 2.6 limited participation of other value chain stakeholders (processors, financiers, professionals, etc) within the Board				
3	Production (crop and livestock)				
	3.1. non quality extension by Agritex and Vets(no quality control) 3.2. technology knowledge offered by Agritex not applicable due to lack of farming equipment 3.3. limited access to finance 3.4. lack of collateral security 3.5. incapacity to prepare financial bids that meet bank standards 3.5. limited access to irrigation water 3.4 inadequate knowledge on market demands(standards, etc) 3.5.inadequate skills to satisfy markets standards(grades, health, etc) 3.4.inadequate information on input markets (diversity, location, costs,) 3.5.inadequate knowledge on livestock, poultry production calendars, disease control, dipping calendars, etc 3.6. unhappy with government institutions commitment and performance(agritex, veterinary officers,etc) 3.7 inadequate collaborative mechanisms with input suppliers(finance, fertilizers,				

	Farmer Concerns	Service/s provided to address the concern	Service Provision mechanism/approach	Farmer payment method for service delivery	Preferred service delivery mechanism
	seed, chemicals,etc				
4.	Post Harvest and value addition				
	4.1. limited and inappropriate storage facilities (poultry, crops,) 4.2. limited equipment for processing and value addition				
5.	Marketing				
	5.1. Limited knowledge of viable markets(local, regional, international) 5.2.Poultry products sold sporadically in small quantities 5.3.Poultry farmers face import competition 5.4. Horticultural products periodically over-flooded at Mbare 5.5.high transportation costs and inappropriate transportation facilities for perishables 5.6.no representation at Mbare Msika where makoronyera short change farmers 5.7.limited export opportunities for Horticultural products 5.8.Grains face low prices and late payments 5.9. Oilseeds, cotton, face low prices and high input costs 5.10.limited knowledge on exporting regulations 5.11. no information on available markets, prices, standards, etc 5.12. coordination mechanisms with product markets (local and international)limited				

	Farmer Concerns	Service/s provided to address the concern	Service Provision mechanism/approach	Farmer payment method for service delivery	Preferred service delivery mechanism
	5.13.high transport costs to markets 5.14. low product prices				
6	Information Technology(ICT)				
	6.1.limited communication technologies				
7	Other services				

B) Cost of services in the past three years (2010, 2011, 2012)

Cost category	Cost (S)	Revenue sources					
		Donor	Own				
			Levies	Member Fees	Subscriptions	Investments/rentals	other
Human Resources and administration							
<u>Equipment</u> vehicles, computers, office furniture photocopiers, printers,							
Operational and administrative costs							
Total							

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ANNEX 4: ORGANIZED FARMERS' BUSINESS MODELS–

Business Models

Land Leasing Model

A pre-condition of this model is land-ownership by a group of people or community. The owners of the land, organized in an entity, lease the land to a production company which cultivates the land and harvests and sells the produce. The entity of land-owners receives two types of revenue: a leasing-fee and a percentage of the sales of the company. This model is often seen in Community Forestry, but could also be suitable for other value chains where cultivation, production and processing is complex.

Cooperative Model

An autonomous association of persons who voluntarily cooperate for their mutual social, economic and/or cultural benefit. Cooperatives are owned and managed by the people who use its services. The farmers, through membership of the cooperative have a say in management and strategy of the cooperative.

Shareholding Model

An autonomous commercial or social business, owned by shareholders. In our view of the Shareholding Model, individual farmers or groups of farmers are among the shareholders and can voice their interests through shareholder meetings, while daily management is performed by the specialized staff and directed by a board. The board is elected by the shareholders and does not necessarily contain representatives of the shareholders but people within the enabling environment of the business who with their specific knowledge and network are best suitable for this specific business.

Contract Farming

Individual farmers sign a contract for delivery of a specified quantity and quality of produce in a certain period to a specific buyer. Usually the contracts are negotiated by a voluntary association of those farmers in order to give the farmers a firmer voice in the negotiation of contract conditions and price with the buyer. The revenues received by the farmers are the sales price x quantity of goods delivered with the right quality and at the right time. Possibly the farmer will need to pay a contribution to the association which negotiates on his behalf.

Business Models

Hybrid Model

The Hybrid Model is almost equal to the Contract Farming Model with the important difference the revenue received by the farmer is a percentage of the revenue of the buyer. This while the farmer, nor its association, have no say in the management or strategy of the company. The model is based on extraordinary trust between the farmer and the buyer or in a situation where the farmer is highly dependent on the specific buyer.

Collaborative Trade Model

Specific characteristic of this model is that the individual farmer remains owner of the product until almost the end of the value chain. The intermediate processing services are hired from third parties, while the farmer remains owner of the product until sales to a buyer almost at the end of the chain. Since the farmer remains owner far up the chain, the product risk is also mainly bourn by the farmer and the period that pre-finance is necessary is long. The advantage of the model is though that most added-value is added to the product while the product is in possession of the farmers and thus the extra margin of this added-value also return to the farmers as financial return.

Source: Agri-ProFocus(internet)

ANNEX 2: LMAC RESPONSE TO CTC



Zimbabwe Association of Abattoirs
Old Show Office, Exhibition Park, Harare

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Zimbabwe

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28th January 2013

The Director
Competition and Tariff Commission
No. 1 Kwame Nkrumah Avenue
Block 1, 2nd Floor
Harare

Attention: Mr A J Kububa

Response to the Competition and Tariff Commission (CTC) by the Zimbabwe Association of Abattoirs (ZAA) to Allegations of Restrictive Practices by Private Abattoirs

The allegations included in the CTC notice are of private abattoirs:

- 1) "opening their own retail outlets" and
- 2) "selling beef directly to individuals at the same price that they charge to the butcheries and other bulk customers"

In direct response to the above allegations the ZAA, following an industry meeting held on the 16th of January 2013, would like to bring to the attention of the Commission the following observations:

- a) Members of the Association are not aware of any law in Zimbabwe preventing abattoir operators from vertically integrating into the meat retail sector and that this is not a new phenomenon in Zimbabwe. CSC has traditionally operated a retail division (Meat Pride) which has been an accepted practice without contravention of the law.
- b) Members of the ZAA who were present at the meeting charge more in their retail outlets compared to their wholesale prices to client butcheries. Table 1 shows wholesale and retail price comparisons for Montana Meats own and client butcheries for the week beginning 14 January 2013. It shows that client butcheries are applying a margin over wholesale prices of about 33% compared to an average of 25% in Montana's own butcheries. Thus

Montana is not charging the same price to butchers as in its retail outlets. Only a lower margin is charged, which is of benefit to meat consumers while leaving enough room for client butchers to gain a reasonable margin and cover the expense of operating a retail outlet.

- c) Members present at the meeting also noted that in order to exercise oligopoly power to manipulate retail prices, abattoir operator involved in retailing would need to be controlling a high proportion of the meat market. Their assessment of the market leads them to conclude that this is not the case. Using Montana as an example, only 21-25% of meat processed by their abattoirs is retailed through their outlets. The rest is wholesaled to small client butcheries as well as large supermarket chains such as OK Supermarkets. Only a few abattoirs are vertically integrated into retailing, the majority operate purely wholesale businesses. The top 7 private beef abattoirs (by volume), contribute +/- 54% of the beef slaughters (see table 2) Only 3 of these 7 organisations have retail divisions. Approximately 25% of beef from these companies is retailed in own butcheries which implies that only 17% of cattle slaughtered by the top seven abattoir companies is internally retailed. Given the small share of private abattoirs in the retail market we conclude that the beef market is a competitive market. No single player in the industry has the ability to manipulate or control market prices.
- d) The allegations reported to the Commission ignore the influence of butcheries /retailers integrated into live cattle production and buying operations. Retail operators compete in live cattle markets with abattoirs, producing and/or buying cattle for custom/service slaughter at private abattoirs and on selling through their butcheries. The ZAA estimates that custom / service slaughter accounts for between 10% and 15% of formal slaughter volumes.

Given the above observations, the ZAA concludes that, in the absence of more specific accusations about modes of member business operations, there is no basis for the allegations submitted to the Commission.

Thank you for your kind attention.

Mr Godfrey Chanetsa
Chairman, ZAA

Table 1: Retail and Wholesale Price Comparisons for Montana Client Butcheries and own butcheries in Harare for week starting 14 January 2013

Montana Butchery Clients	PRODUCT	BUYING PRICE	SELLING PRICE	LOCATION	Margin %
Shop Express	OHQ	\$5.10	\$6.80	Glen View	33%
	OFQ	\$4.50	\$6.50		44%
Meat Plus	X sides	\$3.70	\$4.95	Glen Norah	34%
	B sides	\$4.50	\$5.90	Glen View	31%
	SFQ	\$4.80	\$6.00		25%
Hwenjes	XFQ	\$3.50	\$4.90	Glen Norah	40%
	XHQ	\$3.90	\$5.50		41%
	BHQ	\$4.95	\$6.00		21%
First Choice	BHQ	\$4.95	\$6.50	Kuwadzana	31%
Unifresh	XFQ	\$3.50	\$4.80	Mbare	37%
	XHQ	\$3.90	\$5.50		41%
Vivante	BFQ	\$ 4.05	\$5.70	Chitungwiza	41%
Bvambu Bvambu	XFQ	\$ 3.50	\$4.30	Highfields	23%
	BFQ	\$ 4.05	\$5.50		36%
	SFQ	\$ 4.80	\$5.90		23%
Musariri Bty	BHQ	\$4.95	\$6.50	Mufakose	31%
Chimbadzwa Bty	BHQ	\$ 4.95	\$6.00	Warren Park	21%
Kings meats	BFQ	\$ 4.05	\$5.50	Chitungwiza	36%
Average Margin(%) for client butcheries					33%
Montana Harare Butcheries	SFQ	\$ 4.80	\$5.80	Union Avenue	21%
	BFQ	\$4.05	\$5.20	All Harare Shops	28%
	XFQ	\$ 3.50	\$4.40	Southerton, Mbuya Nehanda, Rezende	26%
Average Margin(%) for Montana butcheries					25%

Note: Suffix for grade: S=Super; O=Choice; X = Economy; B= Commercial. FQ=Fore quarter; HQ=Hind Quarter

Table 2: Cattle Slaughter Share of the Top Seven Abattoirs

	Share of Slaughter October 2012 (%)
Bulawayo Abattoirs	10.4%
Carswell Meats	12.5%
Sabie Meats	4.1%
Koala	5.2%
Montana	13.0%
Surrey	4.6%
CSC	3.9%
Total Big Processor Share of Slaughters	54%
Total Slaughters in October	21,358

Source: Meat Graders, DLPD, Ministry of Agriculture, Mechanisation and Irrigation Development

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Agricultural Marketing Authority
"Promoting fairness and order in the agricultural sector"

All correspondence to be addressed to :

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Website: www.ama.co.zw

3 April 2013

The Secretary

Ministry of Local Government, Rural and Urban Development

RE: PROPOSED MODEL BY-LAW ON AUCTION AND SALE OF LIVESTOCK

Further to our earlier communication on the above matter, please be advised that the Agricultural Marketing Authority (AMA) has held additional consultative meetings with stakeholders in the cattle industry to discuss the implications of the proposed by-law on the livestock sector.

Please find attached for your attention, detailed comments and recommendations that emanated from these meetings. Specific to note is the fact that all stakeholders consulted raised concern that the proposed levy of 11.625% of knock down price is too high and would render livestock production unviable. Stakeholders proposed that the levy be reduced down to 5% broken down as follows:

Institution	Levy (%)
Council	2.5% (1.5% for RDC and 1% for owner of sale pen)
Livestock Development Department	1%
Auctioneer	1.5%
Total	5%

Furthermore, stakeholders agreed that any direct sale of livestock by farmers to buyers should not be subject to the above levy.

We stand ready to clarify these and any other related issues that might require clarification. AMA remains committed to increasing efficiency in the marketing of agricultural products.

We await your response.

Yours sincerely



R. Mutenha

Chief Executive Officer

cc Mr N Masoka, Secretary for Agriculture, Mechanisation and Irrigation Development

cc Mr B Makodza, Director, Livestock Production

cc Mr R Mozhenty, Secretary General, Association of Rural District Councils

cc Mr S Zawe, Chairman, Livestock and Meat Advisory Council

cc The Commissioner General ZRP

Attention: Assistant Commissioner B. Dumbura

cc Mr S. Goredema, Zimbabwe National Farmers' Union

cc Mr P. Zacharia, Zimbabwe Farmers' Union

ANNEX 3: WHITE PAPER ON TECHNICAL ASSISTANCE FOR LIVESTOCK IDENTIFICATION AND TRACEABILITY SYSTEM (LITS) IN ZIMBABWE

Technical Assistance for Livestock Identification and Traceability System (LITS) in Zimbabwe

A. Background

Livestock Identification Trust

The Livestock Identification Trust (LIT) was established in 1999 as a joint effort between the Commercial farmers' Union (CFU), the Zimbabwe Commercial Farmers' Union (ZCFU) and the Zimbabwe Farmers' Union (ZFU) to expedite and promote cattle traceability in Zimbabwe to ensure compliance with the EU Regulations. Trustees are representatives from CFU, ZCFU, ZFU, Department of Livestock and Veterinary Services (DVS: Competent Authority), Auctioneers Association, Meat Exporters, Ministry of Lands, Agriculture and Rural Resettlement (MoMID) and National Association of Dairy Farmers (NADF).

Zimbabwe Cattle Traceability Scheme

The LIT was appointed by the Competent Authority as the independent body responsible for the implementation of the Zimbabwe Cattle Traceability Scheme (ZCTS). This was setup as a voluntary scheme and is centred on being able to trace livestock movements from the farm of origin to the abattoir. This involves identifying the property where the animal is born and subsequent properties that it is moved to. Animals are uniquely identified by tagging with tamper-proof tags. Each tag is laser printed with a unique 10-digit number and cattle are tagged with two tags, one in each ear. The Scheme was marketed as an insurance policy; traceable cattle could be marketed for local or the export market whereas non-traceable animals would only be eligible for the local market.

Information about the tagged animals (their date of birth, breed type, and details of its parents) is captured on a sophisticated computerised database maintained at the LIT offices. Based on returns the database tracks animal movements as per the requirements of the ZCTS. Producers have utilised the ZCTS system to assist with on-farm management of cattle and on numerous occasions, the database has identified the rightful owners of strayed cattle as well as provided proof of ownership in stocktheft cases.

Database

The Trust established a database that would cater for traceability as well as dairy herd performance recording to replace the Canadian Cobalt based programme that was not guaranteed to be Y2K compliant.

Operations & Financing

The establishment of the Trust was facilitated by a grant and loan from the Cattle Producers' Association supported by an additional loan from the National Association of Dairy Farmers. Financing of the Trust was primarily by means of a levy on all animals processed for export supplemented with dairy performance processing income. The staff compliment was 23 and included a Bulawayo office. Tag sales averaged 50,000 per month and negotiations were at an advanced stage to open a Chinhoyi

office. The Trust's ZCTS passed an EU audit in January 2001 and was key to Zimbabwe's ability to continue to export beef to the EU.

Cessation of Beef Exports

The primary driver for the identification and traceability was lost following the outbreak of Foot and Mouth Disease in August 2001. As a result, the Trust down-sized operations, closed its Bulawayo office, and reduced staff compliment to eight. And while some producers continue to make use of traceability tags, sales of traceability have reduced to 2,000 per month. Similarly, number of herds participating in dairy herd performance has decreased from over 80 herds (25%) to less than five regular performance tested herds.

Coping Mechanisms Post August 2001

In order to ensure the continued operations the ZCTS and dairy herd performance recording, the Trust provided administrative and secretarial services to a number of organizations in the livestock industry in accordance with provisions of the Deed of Trust. Firstly, with the dramatic decline in the number of registered stud breeders from 250 to 60, the Trust undertook to provide services to the Zimbabwe Herd Book. Latterly, the Trust has been contracted to supply administrative and secretarial services to the Livestock and Meat Advisory Council, the Zimbabwe Poultry Association, the Stockfeed Manufacturers Association, the Zimbabwe Quality Assured Pork Scheme, the Pig Producers' Association of Zimbabwe and the Zimbabwe Association of Abattoirs. And more recently the Trust entered in a joint venture to manage Animal Breeders, providing semen and artificial insemination services to a growing demand by the livestock industry, principally dairy cattle.

Financing Post August 2001

The Trust has maintained and grown its service provisions by generating income from a number of sources. The staff compliment of eight has remained static over the past years (manager, accounts officer, admin officer, three reception, sales and data capture staff, driver and officer orderly). Previously, traceability tags were sold at cost, post-2001, a mark-up was applied to the tags to ensure income to ensure maintenance of the ZCTS. The Trust also started to market management tags (blank tags) to a wide range of species (cattle, sheep, pigs, goats, ostriches and even crocodiles) to meet market demand.

In 2010 the Zimbabwe Herd Book commissioned new software to cater for the needs of the Herd Book and for traceability in one database (BreedPlan) as well as and appropriate software to service the needs of the dairy industry (Dairy Express).

In 2012, income attributable to the core function of the Trust, that is, the Zimbabwe Cattle Traceability Scheme, amounted to \$17,000 (10% of total income). Income from allied core function, that is services to the Zimbabwe Herd Book, was \$30,000 (18% of total income). Income from non-core service provision to the associations amounted to \$92,000 (55% of the total income). Hence, the Trust has managed to continue with service provision of core functions by income from non-core functions. In

2012 the Trust posted a net income of \$5,000, however, no provisions have been made for capital expenditure and there is a need to replace aged vehicles, office equipment and furniture.

Following the signing of the Memorandum of Understanding with the USAID’s Zimbabwe Agricultural Competitiveness Program (Zim-ACP), significant support technical support has been afforded to the associations (CIBER assessments, regulatory review process) necessitating more of the Trust’s resources to the growing advocacy requirements of the associations. These have been considerably bolstered by the secondment of an Economist and Assistant Administrator/Economist, which in turn is generating more advocacy work (e.g. livestock strategy paper, costs of compliance study, regulatory impact assessments, ZPA branding initiative, market information).

B. Resuscitation of the Livestock Identification and Traceability System

In 2012 the ZIMACP sponsored a study to review the livestock identification and traceability system in Zimbabwe. The authors of the review concluded that the livestock traceability system is currently not fully functional and there is need to revamp it for the benefit of the livestock industry. They concluded that this needs active engagement of all key stakeholders in the sector including government, the livestock production industry and service services. Unique identification of breeding stock will allow genetic improvement of livestock as well as meet acceptable standards for traceability internationally. A combination of enforcement of legislation and provision of incentives should enhance adoption by majority farmers, including smallholders. They also concluded that there is need to develop a budget for implementation of the system and that there is need to create frameworks for sharing such costs among all actors along the livestock value chains to ensure viability. The revamping strategy needs to also budget for education and promotion campaigns to ensure rapid adoption of the livestock identification system. Finally, they conclude that there is need to review the basic LIT system to ensure it remains relevant to stakeholder needs as well as in line with regional and international norms.

Resuscitation of the livestock identification and traceability in Zimbabwe will meet growing requirements of many stakeholders in the livestock industry (see table below). Interested parties in the resuscitation of LITS in Zimbabwe include:

Stakeholder	Requirement
Producer	Healthy, productive, compliant, marketable cattle Reduced transaction costs associated with police and veterinary clearances On-farm management tool Facility to ‘hang’ other services such as Good Management Practices and Animal Welfare
MoAMID	Strengthen government service to producers
DVS	Health, surveillance, compliance, livestock movements, disease controls, trace-back system, food safety, animal welfare, dip-fee collection
DLPD	Livestock Production and Extension, Improved access to market
ZRP	Improved owner identification, reduced theft, addressing issues with stray cattle;

Unions / Commodity Associations	Membership Service to producers
Abattoirs	Reduced costs of transactions (owner identification) Aid adherence to movement controls
Politicians / Local Gov	Improved community relations
Butchers/ Retailers/ Consumers/ Importers	Facility to address consumer concerns regarding food safety and animal welfare
LIT	National Livestock Identification and Traceability System
Stockfeed manufacturers	Improved nutrition advise and sales
Drug companies	Improved health advise & sales
Bankers	Collateral
Donors	Poverty alleviation

In addition, resuscitation of LIT will also help Zimbabwe meet its regional and international obligations. Of importance is the current AU-IBAR drive that member states develop LITS to facilitate trade and risk management in disease control and food safety in accordance with OIE guidelines and standards in a bid to promote trade between African countries.

Resuscitating the LIT requires a number of key interventions including:

- Agreement on the new LIT technology
- Agreement on an implementing framework for the LIT system
- Start-up financing to rehabilitate the Livestock Identification Trust;
- Promotion of LITS; and
- Satellite offices around the country to improve producers' access to LITS.

Technical Assistance to Help Initiate LIT Resuscitation

Technical assistance is required to facilitate the drafting of a work plan for the resuscitation of LIT for consideration by the Trustees. The work plan needs to detail the following:

- 1) What types of identification technologies will cost effectively address the above demands for traceability? What is the cost and benefits of alternative identification schemes?
- 2) What support regulatory framework is needed for the traceability scheme?
- 3) What institutional arrangements would effectively manage the traceability scheme across the whole country? In particular how do we marry the current Livestock Identification Trust functions together with DLPD, DVS and farmer organisation to implement the scheme?

- 4) What are the alternative funding mechanisms that can be adopted to finance the scheme? Specifically how would farmers, industry and government contribute to the fund?
- 5) What awareness strategies working with farmer organisations and other representative bodies, and at what cost, would be needed to ensure adoption of the scheme?
- 6) Detailed budget divided into (i) short-term (6-12 months), (ii) mid-term (12-24 months) and (iii) beyond to implement the resuscitation of LITS.
- 7) Meeting of the Trustees to consider the work plan.

ANNEX 4: ANALYSIS OF THE PROPOSED AMA POULTRY AND POULTRY DEVELOPMENT REGULATIONS

ANALYSIS OF THE PROPOSED AGRICULTURAL MARKETING AUTHORITY (POULTRY & POULTRY DEVELOPMENT) REGULATIONS 2012

A. LEGAL BRIEF

The proposed Regulation raises serious anomalies from a legal and pragmatic perspective. A section analysis highlights the following issues:

Interpretation Clause

Key terms used in legislation are explicitly defined to avoid ambiguity. Terms, words or phrase are usually having a meaning which differs from its ordinary, everyday, current meaning. Definition should be explicit either to exclude some meaning it would ordinarily have, or to include some meaning it might have but not always, or to include some meaning it might not have ordinarily. Ambiguous or vague definitions can render the whole legislation ineffective.

An analysis of the clause suggests that the definitions are not well-defined, lack precision and are too wide. In particular the following definitions are ambiguous;

- **Producer.** The definition that is provided is too wide, and by implication would include anyone who produces chicken irrespective of the number produced, and would also include the indigenous chickens. For example, a producer in rural areas who occasionally sells chicken and eggs and with total sales of less than 100 per year is still classified as a producer.
- **Importer.** The definition of an importer is also wide and vague. The definition implies that a cross border who on returning from South Africa imports 2 kgs of chicken or chicken products, or who brings a crate of eggs for his or her own consumption is classified as an importer for the purposes of this Act. Likewise the term exporter needs to be precise.
- **Contractor.** The term is defined vaguely, and the use of the term feed renders it more ambiguous, and will also need to be defined if it is to be used.
- There are also important terms used throughout the document that need to be stated and well defined in the Interpretation clause. Failure to define them renders the sections where they have been quoted ambiguous, vague and ineffective. Such terms include;
 - **Poultry.** What species of bird does the term involve, for instance, whether the indigenous chicken, guinea fowl, ostrich are composed in the term?

- **Person.** This must be defined to include natural person, and juristic person. The term company should be avoided or fully defined.
- The term **business operation** in clause 4 is not defined and renders the clause where it is used vague and unclear.
- The terms used on the **Poultry Return Form** should be clearly defined to avoid ambiguity, as it can also render the form technical and difficult to comprehend.

Registration Clause

- **Clarity and Interpretation.** As a result of the wide definitions, the clause on registration is rendered unclear and ambiguous, potentially making it ambiguous and impractical. The classes of persons are not qualified; the term poultry is omitted, maybe by mistake. Even if it were included as a result of the wide definitions every producer irrespective of number of chickens/poultry must be registered.
- **Feasibility and Pragmatism.** The registration of industry stakeholders whilst important need to be done in a pragmatic manner. In an industry dominated by informal and small scale and diverse producers, registration of all producers may not be feasible. Such a requirement proffers an unjustifiable burden for a seasonal producer rearing 50 chickens to look for AMA offices and register every time they start or cease operations.

It also proffers a resource burden on AMA where resources would need to be channeled towards registration of probably more than half a million producers in all districts of Zimbabwe, who at some point rear chickens for sale irrespective of the margins.

If such a provision is to be applied, there is need for a production cap or certain exemptions categories to be classified and stated.

Omitted Issues

- **Administration of registration Issues.** The Regulation does not provide which office is responsible for registration. Where a clause contains potential adverse effects for non compliance it should also specify timeline, format of registration. Further, the office responsible for registration should also be given a timeline for registration of an applicant for the administrative procedure to be fair.
- **Data collection.** The office in charge of registration must be legally mandated with the duty to keep the records and maintain a database of all registered stakeholders.

Record and Returns Clause

- **Training and Feasibility.** The records and returns clause proffers a technical burden on most small scale producers. Administrative justice requires that there are programmes for awareness and training before introduction of such a measure. Reference is again made to the issues relating to

Feasibility and practicality, in light of the training needs of all small scale producers, irrespective of the number of chickens they produce for sale.

- **Ambiguity.** The records clause does not refer the Form to be used. There is need to confirm whether the Returns form is the same to be used for such record, and a reference to such form should be made in the clause.
- **Use and Protection of Information.** There is need for clause addressing and protection information.

Standards and Classification

The clause does not proffer any regulatory significance or probative value to the Regulation and should be removed. It is a statement of policy rather than regulation.

Poultry Development Fund Clause

- **Legality.** This clause offers various legal and operational challenges. Subsidiary legislation should always be consistent with the parent legislation. The proposed regulation should be consistent and be interpreted in light with the AMA Act. It is important to understand the relationship between section 37 of AMA Act and this regulation. Section 37 provides for the powers of the Authority to impose levies. Section 37 particularly provides for the Minister's powers to impose levies to such persons (producers, processors, buyers) with respect to **agricultural products produced in Zimbabwe**. Therefore, the Minister does not have the mandate to impose levies with respect to agricultural products not produced in Zimbabwe. Clause 7(1)a of the proposed legislation is therefore inconsistent and contrary to section 37 of the parent Act.

Furthermore, the proposed levy amounts to an import duty. If such is to be set it must be set by the Ministry of Finance. On that note the current budget proffered an import duty in the poultry industry, and this provision will amount to double import duty, and will likely face regional and international resistance in line with our trade obligations.

- **Inconsistency and Ambiguity.** Clause 7(1)a of the proposed regulation includes the phrase, **"imports for consumption"**. Firstly, the section 37 suggests that levies should not extend to agricultural products for own consumption. Whereas, the proposed legislation suggests that any importer even a cross border who imports eggs or chicken for own consumption should pay this import duty. It poses an inconsistency challenge, as it seems the proposed legislation is no longer in tandem with the parent Act.
- **Feasibility and Pragmatism.** Further to, it also poses an administrative burden on the issue of enforcement as this will require resources at the border, both technical and human to make the clause effective. The term processing fee is also used, but it's not clear what in actual fact is being processed. Holistic assessment suggests that the feasibility and practical application of the collection of the levy with respect to clause 7(1)a renders this part of the clause inoperative and ineffective from a legal and practical perspective.
- **Management of the Fund.** There is no reference to the management of the Fund, even reference to the parent Act. By assumption they are to be remitted to the Fund in terms of the parent Act.

The management of the Fund in terms of AMA Act provides a number of concerns for the poultry industry. Part 1V of AMA regulates the Agricultural Marketing Fund. Collected levies are pooled into the Fund in terms of Section 3 of the Act. The Minister has the authority and discretion to use money in manner he deems fit in light of the objects of the fund, in terms of section 33 and 34 of the Act. This renders the following challenges:

- There is no segregation of money as it is all pooled into one fund. Therefore there is no strict regulation that such money is poultry money, and another is cotton money. Money collected from poultry industry may not be necessarily used for poultry.
- There is no industry stakeholder participation in determining the use of collected levies. The Minister has the discretion to use money in activities he deems fit. As such, poultry levies can be used for support of other agricultural products or other administrative issues.

Offences and Penalties Clause

The Offences and penalties clause is not clearly defined. For instance, does non-compliance with any provision of the Regulation warrant the same level of penalty?

- **Enforcement.** There is no provision dealing with enforcement issues. Section 4(2) of the Act provides for delegation of inspection powers by the Authority. However, the exercise of such powers is not clearly defined.

Poultry Return Form

As previously highlighted the form potential provides technical challenges to most small scale producers who are likely to have difficulties in filling out the form. The language used is not so clear, especially to most industry stakeholders. There is need for training and use of other languages to make every producer understand it. If such a form is to be required it is proposed that stakeholders be trained and be given timeframe to adjust before such compliance is mandated of them.

Conclusion

The proposed regulation, while noble in principle is fraught with a variety of legal and feasibility challenges potentially rendering the regulation ineffectual and unworkable. A regulation which provides for the development of the poultry industry is a welcome proposal. In light of that, a more preferable, mutually amiable proposition is that stakeholders work together and come up with a strategy that includes registration of stakeholders and the development of a poultry development fund in workable, legal and beneficial manner.

B. ECONOMIC ANALYSIS

COSTS

A. “Poultry Industry Development Fees and Levies” (Section 7)

(1) Costs to Breeders (Day-Old Chicks)

The proposed regulation includes a fee (levy) of “1 cent per every chick sold or retained by breeder.” Current statistics on Day-Old Chicks show that the poultry industry as a whole is producing about 1.62 million day-old chicks per week (average January-June 2012) that equates to about 84.2 million day-old chicks per year. The proposed fee of 1 cent per chick would therefore result in about \$840,200 per year. This amount represents the total cost (income foregone) to the industry’s day-old chick breeders (all breeders combined).

(2) Costs to Importers (“Poultry and Poultry Products”)

The proposed regulation includes a fee (levy) of “5 cents per kg on all poultry and poultry products imports.” We are assuming that “poultry” in this sentence refers to imported poultry (chicken) meat products and that “poultry products” refers to imported poultry (chicken) eggs. Current import statistics show that importers as a whole are importing the following quantities of the respective products:

<u>Product</u>	<u>Imports per month (kg)</u>	<u>Basis of Data</u>
Chicken meat products	1,000,000 kg/month	Current quota limit/month
Chicken eggs	0 kg/month	Current ban on egg imports
Total kg per month:	1,000,000 kg/month	

Extrapolating from these statistics, total imports of chicken meat and egg products currently amount to about 12,000,000 kg per year (all importers combined). Multiplying this figure by the proposed fee of 5 cents per kg would therefore result in about \$600,000 per year. This amount represents the total cost (income foregone) to the industry’s importers of chicken meat and egg products (all importers combined).

(3) Total Costs Attributable to Section 7 “Poultry Development Fees and Levies”

Combining the Costs to Breeders and the Costs to Importers, the total costs of the proposed regulation that would be attributable to fees (levies) per Section 7 would be \$1.44 million per year.

(4) Comments on Section 7

The analysis of Costs derived from the fee schedules in Section 7 needs to consider the potential differential impacts of the payment of the respective fees on distinct interested parties. Some initial comments (non-exhaustive) on the analysis that should be undertaken are:

- **Breeders:** Who are the breeders? Can/should they be categorized into, say, “large” vs. “small” breeders, and in the case of “small” breeders, into “formal” vs. “informal” breeders? Which of these categories of breeders would be better or less able to absorb the 1 cent fee per day-old chick sold or retained without seriously affecting profits? Would all of this cost be passed on to consumers? In the case of “informal” small breeders, is this a significant category, and what complications will there be in the requirement for their (formal) registration with the AMA?
- **Importers:** Who are the importers? Is there an argument for their being unfairly taxed vis-à-vis domestic producers of chicken meat and egg products? Can this be justified? Will the increase in end product prices be passed on to consumers? If absorbed by the importers, what effect will the foregone income have on the average importer’s profitability?
- **Consumers:** What will be the likely impact on the final retail price of chicken meat and egg products to end consumers? As these products are widely consumed, what might be calculated as an anticipated monthly increase in average household costs assuming continued consumption of the same volumes of products?

B. Other Costs of the Proposed Regulation

In addition to the costs associated with Section 7, other costs to be analyzed include:

(1) Registration Costs (Section 3)

How will the Registration process be administered? Once this is determined, it will be possible to analyze the forms required, the complexity of the information required, the time required for registration, and other factors—all of which will carry costs for the registrants. Total costs include those associated with (a) initial registration, (b) periodic registration renewals, (c) notifications to the AMA on “ceasing operations” (de-registration), and (d) new registrations by entities that cease but then decide to restart operations. Will the absolute cost of these registration procedures be unevenly burdensome for different types of entity affected, e.g., by “breeder, producer, abattoir, importer or exporter” per the text of Section 3? What are the differential implications (registration-related costs as a percentage of total entity costs) for different sizes of operator in each entity category?

On the regulator (AMA) side, what will be the new net costs to the AMA to set up and operate the registration system as outlined in Section 3?

Overall, it is noted that there would likely be a need for a comprehensive nationwide information dissemination effort on the requirements of the new regulation, including Training sessions and troubleshooting capacity administered by the AMA to ensure effective implementation of both the Registration (Section 3) requirements as well as the Record Keeping and Returns requirements addressed immediately

below. The costs associated with such initial and ongoing Training and administration need to be estimated, both for the AMA and for the industry (all operators combined).

(2) Record Keeping and Submission of Returns (Section 4 and Section 5)

Similar clarity of requirements, including precise estimates of Training and trouble-shooting administrative costs borne by the AMA as well as the industry, should be calculated for both Record Keeping (Section 4) and Returns (Section 5). In particular, the proper use and filling out of Form PI 1 will need to be very carefully and repeatedly explained.

In the case of importers of chicken meat and egg products, there is also an “import application letter” that needs to be submitted per Section 7 (2), which will require additional Training and perfected use in practice. This again implies new costs to be estimated for both the AMA and the importers.

(3) Offences and Penalties (Section 8)

The importance of ensuring that the Return requirements in Section 5 are correctly carried out is highlighted by the language at the end of Section 7 (2), viz., “the fee or levy paid...shall be accompanied by an import application letter (*relevant to importers*) and return (*relevant to both breeders and importers*) in the form prescribed in the Schedule, certified as correct respectively” [Italicized text added]. In this regard, attention in the analysis of other costs should also be given to the likely imposition of fines “not exceeding level four” for failing to meet any of the provisions of the Regulation (i.e., not just the Return requirements in Section 5 but the Registration, Record Keeping and payments of Fees and Levies per Section 3, Section 4 and Section 7). How likely is it that such fines will in fact be assessed, and with what costs and implications for different affected operators?

(4) Standards and Classification (Section 6)

Section 6 appears to be a commitment by the AMA to coordinate more closely with the poultry industry on standards, import quotas, exports, etc., as they apply to poultry products. The language of Section 6 is an open-ended statement, but it points toward an expectation that there will be new efforts (consultation and coordination between the AMA and the industry). What additional costs will these efforts entail and for whom? This subject appears to relate directly to the benefits that would be derived from the proposed regulation, but without further explanation.

C. Total Costs

The total estimated Cost of the proposed regulation becomes the combination of the items in A and B, differentiated as discussed above.

BENEFITS

In the full Cost/Benefit Analysis, the advisability of proceeding with the enactment of the proposed regulation will depend on sufficient evidence that net Benefits will exceed net Costs over time. As with the Costs, the Benefits need to be analyzed in terms of their differential impact on the distinct interested parties.

It is implied that the fess and levies that are collected pursuant to the Statutory Instrument will be paid into the AMA Fund for purposes of “Poultry Industry Development”—per both the Title of the new regulation and also the title of Section 7, “Poultry Development Fees and Levies.” However, no further language is included in the regulation that clearly indicates how the collected funds will actually be spent. Will 100% (or some other specified percentage) of the estimated \$1.44 million in fees and levies generated per year be dedicated solely to specific research and development activities directly aimed at the poultry industry? What will be the procedure for determining the exact use of the funds on an annual basis? Will the poultry industry in consultation with the AMA be able to directly determine the uses of the funds? What are the implementation modalities? Will the individual poultry research and development activities be carried out by (a) the AMA, (b) the poultry industry associations, or (c) third party specialized institutions, or a combination of all three? How will the terms of reference, timelines, objectives, and expected impacts and benefits of the activities be monitored and evaluated?

Answers to these and related questions are needed before an estimate of the benefits of the regulation can be made. It will also be necessary to predict, with reasonable certainty, a list of at least three to four prototype (typical) research or development activities that are anticipated to be funded over time. The potential benefits of the results of the prototype activities can then be considered, in terms of increased profitability (reductions in costs, higher quality products, increased sales revenues) of poultry operations differentiated by type and size of operating entities (breeders, producers, abattoirs, etc.). Relevant differentiation by gender considerations, e.g., women vs. male small producers, should be included.

With regard to consumers, an estimate would also be constructed on the net impact of the implementation of the regulation on consumer prices. While the imposition of the fees per Section 7 may in the first instance result in marginally higher retail market prices of poultry products, the benefits of the regulation in terms of more efficient and competitive poultry operations may allow for reducing net end market consumer prices and become an important economic benefit at the national economy level in addition to the benefits at the industry (individual firms, value chain participants) level.

PRELIMINARY CONCLUSION

A detailed Cost/Benefit Analysis of the proposed Statutory Instrument (regulation) should be undertaken before determining whether to proceed. Full consultation with the poultry industry in determining the likely costs and benefits is recommended, following a standard Regulatory Impact Analysis (RIA) process. If the regulation can be improved to clearly provide for an expectation of substantial benefits that will clearly exceed costs over time, there may be grounds for proceeding forward with a Poultry Industry Development fund that will serve the interests of the AMA, the industry, and consumers.

ANNEX 5: MONITORING AND EVALUATION

EVENT EVALUATION REPORTS

Stakeholder Meeting for Introduction of STTA Studies 15 January 2013 Evaluation Report

Introduction

Zim-ACP commissioned three interlinked studies to (i) analyse and assess membership databases with plans to facilitate development of effective databases (ii) analyze and assess websites needs and move towards development of the websites (iii) identify and assess areas of strengthening in membership service provision. A kick-off meeting to introduce the three consultants was held on January 15.

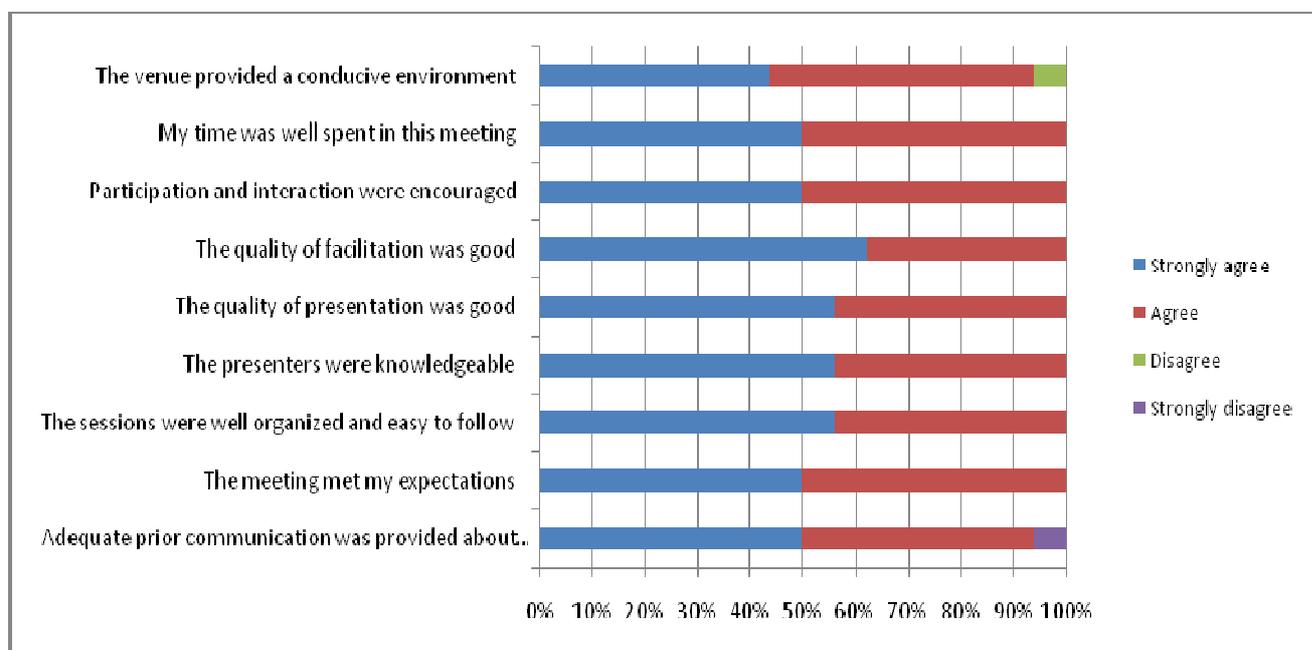
Participants to the Meeting

The meeting was attended by twenty (7 female and 13 male) public and private sector stakeholders. The participants were from Zim-ACP partner organizations ZFU, ZCFU, FACHIG, DOHOPA, LMAC, HPC, and ZWPFT. The meeting's participants list is attached as Annex 1.

Meeting Evaluation

An end-of-meeting evaluation was conducted to get an understanding of whether objectives had been met. The results of the individual evaluation are shown in figure 1. The feedback from the evaluation would be useful in providing lessons for running future taskforce meetings. The evaluation was conducted with the aid of an individual evaluation questionnaire. The evaluation questionnaire is attached as Annex 2.

Figure 1: Meeting evaluation by participants



Participants were asked to rate the meeting overall. The average score given by participants was 88.5 percent. The range was 80 to 100 percent.

Participants had the following contributions towards the work that was to be undertaken:

- Consultants should take time to understand what is on the ground;
- Time frame needs to be increased;
- Hope the intervention will be carried to conclusion

As partner organisations they committed to:

- Provide all the necessary background information;
- Coordinate horticultural stakeholders to have a common approach and
- Give the best of ourselves to this in order for it to be a success

Other comments

- Happy that we are being involved from the start;
- Zim-ACP is doing a good job for Unions

Conclusion

The stakeholders were pleased by the work that Zim-ACP had commissioned for their benefit. They contributed to the procedure that the consultants would use in undertaking the studies. Meetings were scheduled for consultants to meet with all the 8 partner organizations.

Annex 1: List of Participants

	FULL NAME	SEX	ORGANISATION	EMAIL ADDRESS	PHONE NUMBER
1	Teverai Chigogo Nhapi	F	ZWPFT	██████████	██████████
2	Tarisai Chinyemba	F	DOHOPA		██████████
3	O'Dell T Magwagwa	M	AU	██████████	██████████
4	Shadreck Tsimba	M	ZCFU	██████████	██████████
5	Blessing Mungure	M	ZCFU	██████████	██████████
6	Chipo Musarafu	F	HPC	██████████	██████████
7	Chrispen Sukume	M	LMAC	██████████	██████████
8	Vimbai Chigavazira	F	LMAC	██████████	██████████
9	Lloyd Mataya	M	ZCFU	██████████	██████████
10	Wonder Chabikwa	M	ZCFU	██████████	██████████
11	Margaret Kangausaru	F	ZWPFT	██████████	██████████
12	Thomas Mupetsi	M	FACHIG	██████████	██████████
13	Nervous Murombo	M	MAPA		██████████
14	Prince Kuipa	M	ZFU	██████████	██████████
15	Theresa Makomva	F	ZFU	██████████	██████████
16	Cloudious Marimo	M	DOHOPA	██████████	██████████
17	Mutsa Chinyadza	F	MAPA		██████████
18	Pascal Nyasha	M	EPS Mobile	██████████	██████████
19	Basilio Sandamu	M	HPC	██████████	██████████

Annex 2: End-of-Meeting Evaluation Questionnaire

STTA Kick-off Meeting
 Zim-ACP Offices
 15 January 2013

Evaluation Form

	Please tick one cell in each row of these four columns to indicate which statement applies to each aspect	Strongly agree	Agree	Disagree	Strongly Disagree
					
	MEETING PREPARATION				
1	Adequate prior communication was provided about the meeting				
	CONTENT				
2	The meeting met my expectations				
3	The sessions were well organized and easy to follow				
	PRESENTERS				
4	The presenters were knowledgeable				
5	The quality of presentation was good				
	FACILITATION				
6	The quality of facilitation was good				
7	Participation and interaction were encouraged				
	GENERAL				
8	My time was well spent in this meeting				
9	The venue provided a conducive environment				

10. How do you rate the meeting overall (out of 100)?

.....

11. What additional comments do you have on the work to be carried out?

.....

12. What specific role do you suggest your organizations play in this planned work?

.....

13. What other suggestions do you have for your organisation to fully benefit from this exercise?

.....

Other comments/observations/suggestions

.....

**Livestock Industry Stakeholders Consultative Meeting
29 January 2013
Evaluation Report**

Introduction

On January 29, 2013, through Zim-ACP support, a joint Livestock and Meat Advisory Council and Matabeleland Agri-Business Chamber stakeholder meeting in Bulawayo, was convened to discuss the impact of regulations on livestock competitiveness in Matabeleland, Masvingo and Midlands Province. Zim-ACP Regulatory Researcher and Dr Sukume presentations on regulatory issues and the Regulatory Impact Assessment, respectively, informed the participants of the role and importance of research-based evidence for advocacy and lobbying.

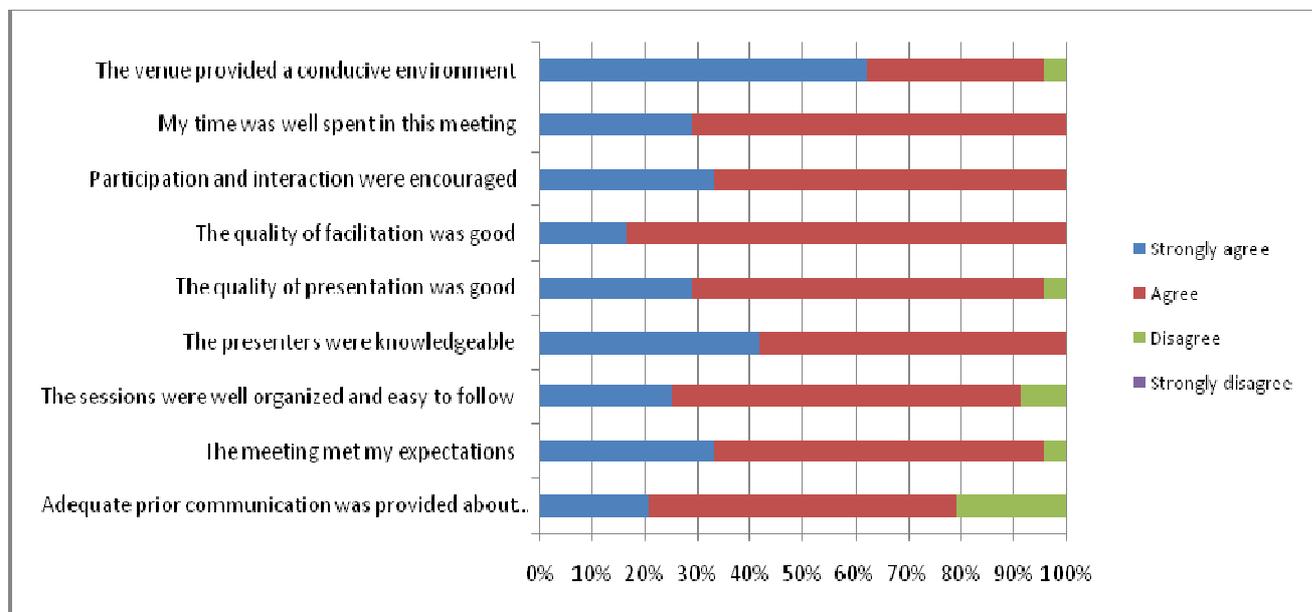
Participants to the Meeting

The meeting was attended by forty seven (11 female and 36 male) public and private sector livestock stakeholders. The participants comprised poultry and beef producers, abattoirs, retailers both small and large scale, academics, wholesalers and government officials.

Meeting Evaluation

An end-of-meeting evaluation was conducted to get an understanding of whether objectives had been met. The results of the individual evaluation are shown in figure 1. The feedback from the evaluation would be useful in providing lessons for running future meetings and solicit feedback from participants. The evaluation was conducted with the aid of an individual evaluation questionnaire. The evaluation questionnaire is attached as Annex 1.

Figure 1: Meeting evaluation by participants



Participants were asked to rate the meeting overall. The average score given by participants was 80.8 percent. The range was 60 to 98 percent.

Participants during evaluation of the meeting proposed short term and medium term actions to be taken as below:

- Let us move with speed to correct the imbalances on the proposed regulations;
- We need to team up as livestock stakeholders for our voice to be heard;
- We should send representatives to consultative meetings called by government with our position papers;
- We need to be knowledgeable on all statutes that affect us as farmers;
- We have learned that there is so much duplication with regards fees and levies by government bodies;
- Need to seek communication from Harare to be of better use to Bulawayo farmers;
- Government departments are simply making plans to make money without being sensitive to the implications
- We need such meetings more regularly
- There is need for policy dialogue and engagement with relevant stakeholders

Other comments

- Good meeting
- Ministers should be present at such meetings

Conclusion

The collaboration, through this meeting, enhanced the advocacy and lobbying efforts of MABC.

Annex 1: End-of-Meeting Evaluation Questionnaire

Livestock Industry Stakeholders Consultative Meeting
 Farmers Pavillion Trade Fair Grounds, Bulawayo
 29 January 2013

Evaluation Form

Please tick one cell in each row of these four columns to indicate which statement applies to each aspect		Strongly agree	Agree	Disagree	Strongly Disagree
					
	MEETING PREPARATION				
1	Adequate prior communication was provided about the meeting				
	CONTENT				
2	The meeting met my expectations				
3	The sessions were well organized and easy to follow				
	PRESENTERS				
4	The presenters were knowledgeable				
5	The quality of presentation was good				
	FACILITATION				
6	The quality of facilitation was good				
7	Participation and interaction were encouraged				
	GENERAL				
8	My time was well spent in this meeting				
9	The venue provided a conducive environment				

10. How do you rate the meeting overall (out of 100)?

.....

11. What additional comments do you have on the proposed regulations?

.....

12. What lessons have you learned from this meeting that you intend to apply?

.....

Other comments/observations/suggestions

.....

**Horticulture Stakeholders Meeting
28 February 2013
Evaluation Report**

Introduction

Horticulture Stakeholders Feedback Meeting aimed at receiving and considering the findings and recommendations of the study: “An Assessment of Market Requirements for Selected Zimbabwean Horticulture Produce in Domestic and Regional Markets for the Development of Standards, Business Development Services and Training Needs for the Horticulture Commodity Industry Group.”

The objectives of the Stakeholder Consultative meeting were to: (i) Receive and consider the report findings and recommendation; (ii) For stakeholders to share ideas on what needs to be done to revive the horticulture Industry; and (iii) Stakeholders to map out a strategy for the Industry for enhancing competitiveness.

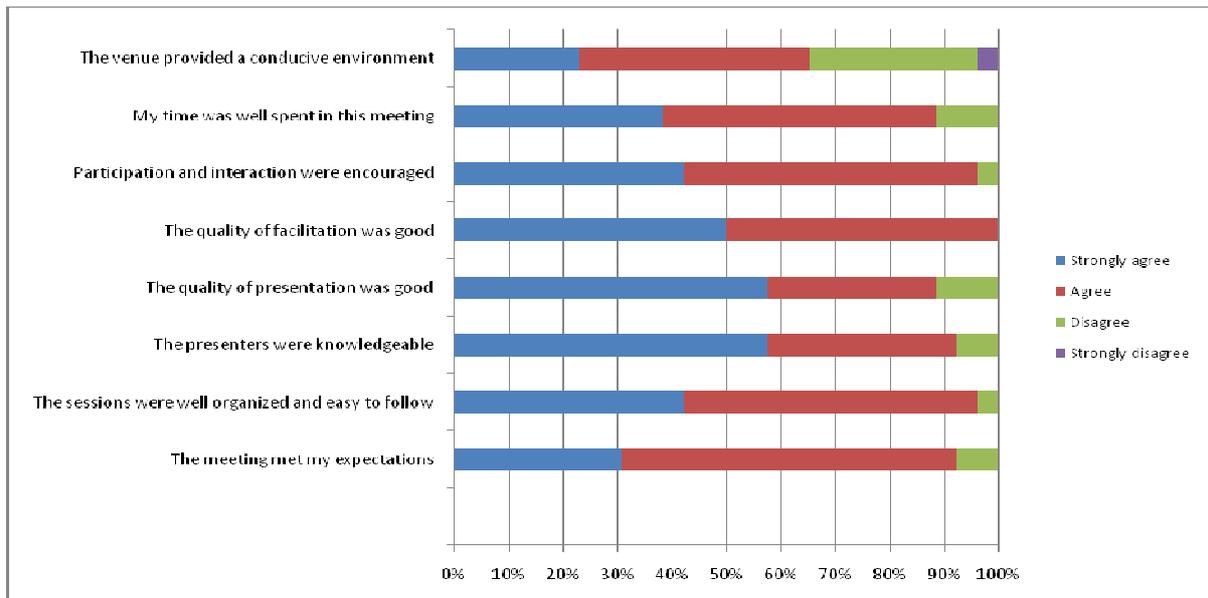
Participants to the Meeting

The workshop was attended by 30 (nine female and 21 male) public and private sector horticulture stakeholders. The meeting’s participants list is attached as Annex 1.

Meeting Evaluation

An end-of-meeting evaluation was conducted to get an understanding of whether objectives had been met. The results of the individual evaluation are shown in figure 1. The feedback from the evaluation would be useful in providing lessons for running future meetings. The evaluation was conducted with the aid of an individual evaluation questionnaire. The evaluation questionnaire is attached as Annex 2.

Figure 1: Meeting evaluation by participants



Participants were asked to rate the meeting overall. The average score given by participants was 79.8 percent. The range was 40 to 99 percent. Participants were happy with most aspects of the meeting

mainly the quality of presentation and facilitation. However, participants felt the venue was not a conducive one.

Comments given by participants during evaluations of the meeting on the paper presented and way forward for the sector are below.

The participants felt that the Paper presented by the Consultant was very good, gave a fair assessment of the market requirements and that it should be shared with processors as well.

The following ideas/strategies were proposed for the horticulture industry to be competitive:

- Set industry wide standards;
- Satisfy the local market first then target regional and international markets;
- Ensuring there is good quality seed to have good produce;
- Promote value addition since horticulture products are perishables;
- Promote aseptic packaging;
- Provide training to producers on standards;
- Coordinated market supply;
- Explore group dynamics for export;
- The government should be tasked to help the industry as it is capable of generating foreign currency;
- Studies should be done from the grassroots to see if farmers are well capacitated to produce for the international markets;
- Market information dissemination system is needed for the sector; and
- HPC needs to play a more active role in coordinating within the sector.

Other comments

- Should invite government (policy makers) to participate in such meetings

Conclusion

The study findings and recommendations were well received by the participants. The consultants will incorporate the input from stakeholders into the final document.

Annex 1: List of Participants

	Name	Sex	Organization	Position	Number	Email Address
1	Dominic Mubvuta	M	Agrichem	Consultant	████████	████████████████
2	Basilio Sandamu	M	HPC	CEO	████████	████████████████
3	Philip Gumunyu	M	ZFU	Marketing	████████	████████████████
4	Nervous Murombo	M	MAPA	Chairperson	████████	
5	Elmon Madzokere	M	Servco	Consultant	████████	████████████████████
6	Gibson Guvheya	M	Samagro	Consultant	████████	████████████████
7	Munodawafa Mutopo	M	FAVCO	Business Development	████████	
8	Brian Musona	M	Telmara	Manager	████████	████████████████
9	Samuel Chaziwa	M	TM Supermarket	Manager	████████	████████████████
10	Mabel Hungwe	F		Facilitator	████████	████████████████
11	Tarisai Chinyemba	F	DOHOPA	Chairperson	████████	
12	Ephenia Nyoka	F	DOHOPA	Member	████████	
13	Claudious Marimo	M	DOHOPA	Secretary	████████	
14	Collins Nherera	M	ZCFU	Horticulture chairman	████████	
15	John Perott	M	C.G/SA		████████	████████████████
16	Emmanuel Songore	M	Pick'n'Pay		████████	
17	Mutsa Chinyadza	F	MAPA	Member	████████	
18	Trynos Chimusimbe	M	Servco	Consultant	████████	████████████████
19	Lovewell Chirawu	M	MAMID	Economist	████████	████████████████
20	Precious Vakisai	F	MAMID	Economist	████████	████████████████
21	Annaias Munyepari	M	Negomo Coop	Member	████████	
22	Tapfumaneyi Adriano	M	Negomo Coop	Chairperson	████████	
23	Since Tsakata	F	Independent	Business Development Officer	████████	████████████████
24	Patience Mangi	F	Market First	Consultant	████████	████████████████
25	Marc Carrie-Wilson	M	CFU	Legal Officer	████████	████████████████
26	Katy Percival	F	Zimflex	Managing Director	████████	████████████████ w

27	Anthony Mlambo	M	Resolved Ext	Agronomist	██████████	████████████████████
28	Godfrey Chitaka	M	Independent	Consultant	██████████	████████████████████
29	Rangarirayi Bamu	M	OK Supermarket	Field Manager	██████████	████████████████████
30	Chipo Musarafu	F	HPC	Program Assistant	██████████	████████████████████
31	Godfrey Nehanda	M	ZimACP	Training Coordinator	██████████	████████████████████
32	Godfrey Mudimu	M	ZimACP	DCOP		████████████████████
33	Joseph Burke	M	ZimACP	COP		
34	TafireyiChamboko	M	ZimACP	Consultant		
35	Earnest Musinamwana	M	ZimACP	Consultant		
36	Fikile Moyo	F	ZimACP	Program Assistant		f ██████████

Annex 2: End-of-Meeting Evaluation Questionnaire

**Horticulture Stakeholders Meeting
28 February 2013
Andy Millar Hall, Harare
Evaluation Form**

Please tick one cell in each row of these four columns to indicate which statement applies to each aspect		Strongly agree	Agree	Disagree	Strongly Disagree
					
	CONTENT				
1	The meeting met my expectations				
2	The sessions were well organized and easy to follow				
	PRESENTERS				
3	The presenters were knowledgeable				
4	The quality of presentation was good				
	FACILITATION				
5	The quality of facilitation was good				
6	Participation and interaction were encouraged				
	GENERAL				
7	My time was well spent in this meeting				
8	The venue provided a conducive environment				

9. How do you rate the meeting overall (out of 100)?

.....

10. What comments do you have on the Horticulture Industry Paper presented?

.....
.....

11. Of the recommendations that have been raised, what will you apply as an individual/organisation?

.....
.....
.....

12. What other ideas/strategies do you propose for the horticulture industry?

.....
.....
.....

Other comments/observations/suggestions

.....
.....
.....

Stakeholder Meeting for Presentation of STTA Assessment Reports

15 March 2013
Evaluation Report

Introduction

Zim-ACP commissioned three interlinked studies to (i) analyse and assess membership databases with plans to facilitate development of effective databases (ii) analyze and assess websites needs and move towards development of the websites (iii) identify and assess areas of strengthening in membership service provision. A feedback meeting to share the findings of the three studies was held on March 15.

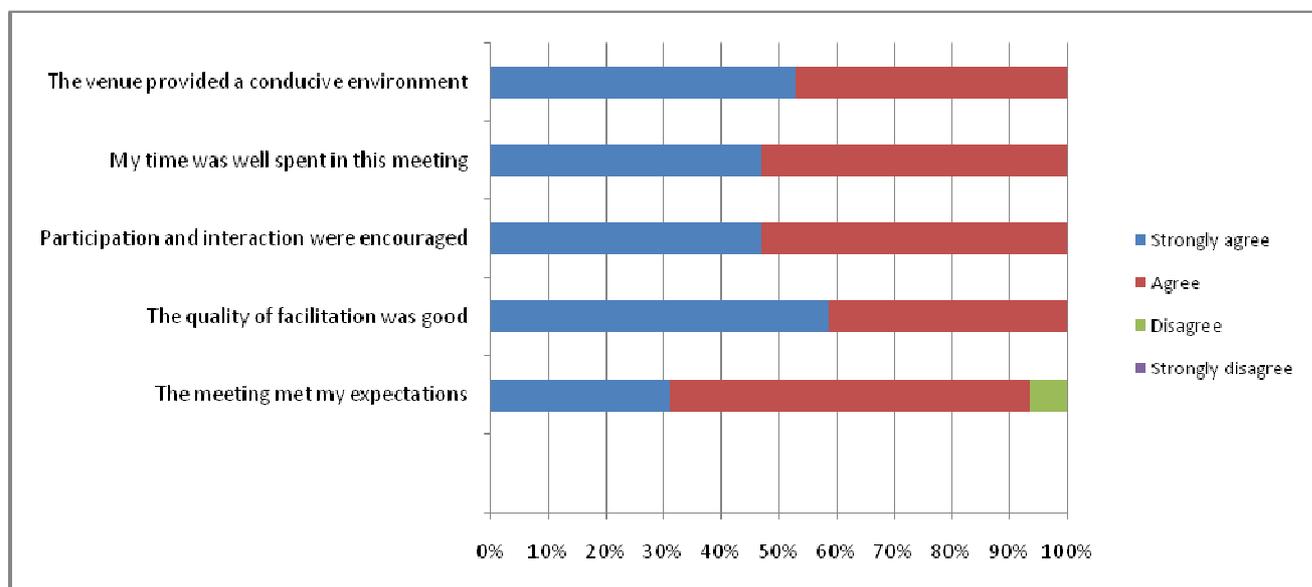
Participants to the Meeting

The meeting was attended by twenty four (seven female and 17 male) public and private sector stakeholders. The participants were from Zim-ACP partner organizations ZFU, ZCFU, FACHIG, DOHOPA, MAPA, LMAC, HPC, ZWPFT and USAID. The meeting’s participants list is attached as Annex 1.

Meeting Evaluation

An end-of-meeting evaluation was conducted to get an understanding of whether objectives had been met. The results of the individual evaluation are shown in figure 1. The feedback from the evaluation would be useful in providing lessons for running future meetings and solicit feedback from participants. The evaluation was conducted with the aid of an individual evaluation questionnaire. The evaluation questionnaire is attached as Annex 2.

Figure 1: Meeting evaluation by participants



Participants were asked to rate the meeting overall. The average score given by participants was 80.8 percent. The range was 60 to 100 percent.

Participants were asked to give additional input on each of the three papers presented. The following were comments given:

1. On the Website development paper :

- Good and well researched paper;
- Identify and work with farmer organisations that have reached a stage at which they benefit from website in terms of service to farmers

2. On the Membership development paper:

- Good paper;
- Next steps should be discussed at individual Union level;
- Organisations can not afford to implement on their own;
- System should be simple and/or less complex;
- Broaden database to service internal communication needs but also help Unions clubs access and value adding services and open new doors on credit market

3. On the Services development paper:

- Good paper;
- Needs improvement on how to implement recommendations;
- Conduct a thorough review of services to identify appropriate partners since not all services identified need a collective action

Other comments

- Leadership training is required for Unions to implement recommendations from studies
- Offer to help review database development and services provision as the Agriculture Finance Working Group

Conclusion

The following were highlights from the studies:

1. Membership Database

An operational membership database in membership associations has various key uses.

- Maintaining communications with members to encourage the sense of belonging and being active in the association or union chapter, in particular newsletters, technical mailings and notices of meetings
- Monitoring and collection of subscriptions
- Mass and group communications to farmers of opportunities such as access to credit, sales, inputs, equipment, training services at group rates, extension services and so forth
- Connecting farmers to credit bureaus to establish their credit worthiness and history so as to access loans

2. Websites

A Website designer engaged with some eight of our clients to analyze their needs to either update or establish websites. Findings were that all organizations have no functional websites even though most of them have the content to fill in the website. Next steps Zim-ACP is continuing work with the website specialist who will assist partner organisation in developing suitable websites as per the requirement of each organization. ZCFU and ZFU defunct websites will be revived and upgraded. The consultant will design websites for HPC and LMAC which had no website before. The HPC and LMAC websites will host those of their affiliated associations, i.e.

DOHOPA, MAPA, ZPA, SMA and PPAZ. For sustainability and ease of maintenance, one website host will be contracted to host the various websites.

3. Service Provision

The major findings were:

- Farmers' demand for services are derived from the challenges they face which are related to; 1) unfavorable policy and regulatory environments; 2) weak governance of the farmers' organizations; 3) need for up-to-date and timely agribusiness advisory and business development services, i.e. extension, training, input supply, finance and insurance; 4) post harvest handling (storage); 5) value addition (processing); and 6) high transaction costs in accessing produce markets and 6) lack of up-to-date and timely market information systems to guide production planning and marketing decisions;
- Using experiences from other African countries, services recommended for provision by farmers' organizations i) Group input procurement; (ii) group output marketing; iii) Group extension services; iv) Group marketing contracts, and v) Warehouse Receipt systems.
- Business development services in demand: writing loan proposal for accessing finance for both working and capital expenditure for improving productivity.

Annex 1: List of Participants

	FULL NAME	SEX	ORGANISATION	EMAIL ADDRESS	PHONE NUMBER
1	Teverai Chigogo Nhapi	F	ZWPFT	[REDACTED]	[REDACTED]
2	Dominic Mubvuta	M	Agrichem Services	[REDACTED]	[REDACTED]
3	Muhle M Masuku	M	MABC	[REDACTED]	[REDACTED]
4	O'Dell T Magwagwa	M	AU	[REDACTED]	[REDACTED]
5	Mario Beffa	M	LMAC	[REDACTED]	[REDACTED]
6	Irene Burns	F	DAI	[REDACTED]	[REDACTED]
7	Vimbai Chigavazira	F	LMAC	[REDACTED]	[REDACTED]
8	Shepherd Manonga	M	ZCFU	[REDACTED]	[REDACTED]
9	Tapiwa Nyamakura	M	ZCFU	[REDACTED]	[REDACTED]
10	Maema Chitsinde	M	ZWPFT	[REDACTED]	[REDACTED]
11	Pepukai Muchazondida	M	FACHIG	[REDACTED]	[REDACTED]
12	Thomas Mupetesi	M	FACHIG	[REDACTED]	[REDACTED]
13	Berean Mukwende	M	ZFU	[REDACTED]	[REDACTED]
14	Ruvimbo Zhewe	F	XD's	[REDACTED]	[REDACTED]
15	Oleen Singizi	F	XD's	[REDACTED]	[REDACTED]
16	Nervous Murombo	M	MAPA	[REDACTED]	[REDACTED]
17	John Macy	M	USAID	[REDACTED]	[REDACTED]
18	Snodia Chikanza	F	USAID	[REDACTED]	[REDACTED]
19	Prince Kuipa	M	ZFU	[REDACTED]	[REDACTED]
20	Paul Zakariya	M	ZFU	[REDACTED]	[REDACTED]
21	Cloudious Marimo	M	DOHOPA	[REDACTED]	[REDACTED]
22	Reneth Mamo	M	IRD	[REDACTED]	[REDACTED]
23	Tinashe Ngirandi	M	Zim-Acp	[REDACTED]	[REDACTED]
24	Henry Chimboza	M	Zim-Acp	[REDACTED]	[REDACTED]

25	Mutsa Chinyadza	F	MAPA		
26	Gilbert Kapswara	M			

Annex 2: End-of-Meeting Evaluation Questionnaire

Stakeholder Meeting for Presentation of STTA Assessment Reports
 Cresta Oasis, Harare
 15 March 2013

Evaluation Form

	Please tick one cell in each row of these four columns to indicate which statement applies to each aspect	Strongly agree	Agree	Disagree	Strongly Disagree
					
	CONTENT				
1	The meeting met my expectations				
	FACILITATION				
2	The quality of facilitation was good				
3	Participation and interaction were encouraged				
	GENERAL EVALUATION				
4	My time was well spent in this workshop				
5	The venue provided a conducive environment				

6. How do you rate the meeting overall (out of 100)?

.....

7. What additional comments do you have on website development paper presented?

.....

8. What additional comments do you have on membership database development paper presented?

.....

9. What additional comments do you have on services improvement paper presented?

.....

10. How do you think your organization will move forward with the recommendations of the three studies?

.....

Other comments/observations/suggestions

.....

Data Collection Tool for Indicators 4.5.2-43 (profitability) and ACP 1 (resources leveraged)

Name of Interviewer.....Date of Interview

Name of Respondent

1. Business Training Course Attended (*This table is completed prior to the interview*)

Course Title	Trainer	Venue	Dates

2a) What (non-farm) business are you involved in?

2b) Is your business operating at a profit now?

2c) Based on your records, what has been your business profit (or loss) this quarter (Jan to March) (*Profit/loss=Gross income less costs incurred during the quarter in the business*).

2d) Was your business operating at a profit before you attended the business training courses?

3. What resources have you leveraged through partnerships with other organisations/institutions (e.g. NGOs, Banks etc) this quarter (Jan to March 2013)?

Type of resource leveraged	Value (\$)	Source

Data Collection Tool for Indicator ACP 1 on resources leveraged

Date of Interview..... Name of Interviewer.....

Name of Respondent Sex

Name of Business Enterprise..... Sex of owner

1. Course Attended in June/ August 2012

Course Title	Trainer	Venue	Dates

2. What resources have you leveraged through partnerships with other organisations/institutions (e.g. NGOs, Banks etc) this past quarter (January to March)?

Type of resource leveraged	Value (\$)	Source