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creative associates, inc.

PROJECT TO PROVIDE TECHNICAL ASSISTANCE TO FENAPI FOR INSTITUTIONAL DEVELOPMENT

FIRST ANNUAL REPORT

October, 1985

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PROJECT TO PROVIDE

TECHNICAL ASSISTANCE TO FENAPI

FOR INSTITUTIONAL DEVELOPMENT

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CREATIVE ASSOCIATES

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OVERVIEW

Ecuador's booming economy of the 1960's and 70's has fallen short of projections for continued growth in the 1980's. The boom of the 70's was caused by the prosperity of the oil industry which stimulated growth in the public sector, thereby creating a semblance of economic stability. Today, the country is dealing with the economic crisis that has ensued: an imbalance of trade, high inflation rates, and a decline in the production of domestic goods. In Ecuador, the establishment of a strong private sector is critical for continued economic growth. The government in Ecuador is undertaking a number of significant economic measures to encourage the establishment and development of the country's private sector. The largest component of the private sector is the small/medium size businesses and industries that are the result of the past economic boom. This small/medium size industrial sector is also the most vulnerable sector in the economy since it does not have the financial and structural strength of the larger industries that make up the balance of the private sector.

The voice of the small entrepreneur needs to be heard by those involved in the economic development of Ecuador. The Federación Nacional de Pequeños Industriales, (FENAPI), the organization that represents the small industrialists of Ecuador, has the potential to be that voice. On August 30, 1984, AID awarded a contract to Creative Associates (CA) to undertake a one year technical assistance effort for the institutional development of FENAPI and its provincial chambers. CA has implemented this effort on site, in Ecuador, utilizing Ecuadorean nationals as staff whenever possible, and assuring that the major portion of grant monies is spent in Ecuador.

Based on CA and AID's assessment, FENAPI had been identified as the most appropriate institution to receive these technical services. FENAPI's membership consists of 19 chambers of small and medium size industries. These chambers are located in six zones, or regions, across the country. FENAPI's leadership is composed of some of the country's most prominent industrial and business leaders. This project was designed to capitalize on the strengths of that leadership and develop it into a valuable resource for the organization.

It was evident that, but for some organizational weaknesses, FENAPI had the potential to become a leading industrial organization in Ecuador with considerable influence in the economic and political spheres. As a well organized institution, it could participate more effectively in national and local policy formation. The goal of the AID contract with CA was to help FENAPI achieve this more effective position.

The original scope of work for the project included eight tasks, designed to strengthen FENAPI's ability to contribute to and fully participate in Ecuador's economic development. These tasks were as follows:

TASK I	Development of a computerized national register of FENAPI membership
TASK II	Development of promotional and informational materials consistent with a well planned public relations strategy for leadership development in the provincial chambers
TASK III	Organization and development of membership services for the affiliated chambers
TASK IV	Development and provision of technical assistance in promoting Savings and Loan cooperatives in the provinces
TASK V	Preparation of a feasibility study, followed by development and promotion of a Federación Nacional de Ahorro y Credito de la Pequeña Industria (National Savings and Loan Federation for Small Business)

TASK VI	Training in financing, identifying sources of credit, granting and administering loan packages, commercializing products, providing market analysis, carrying out administration, and overseeing industrial organization
TASK VII	Identification of joint ventures and opportunities for transfer of technology between small industries in the U.S. and Ecuador
TASK VIII	Feasibility study for the development of industrial parks in Ecuador

From the beginning of the project, FENAPI's potential as an advocate for the private sector was considerable, but so, too, were its weaknesses, especially its lack of administrative and organizational skills. When CA began working with FENAPI in the preparation of the project implementation plan in September, 1984, FENAPI had a staff of five people. These people, an executive secretary, a special assistant to the president of FENAPI, two secretaries and a messenger, were funded by a grant from the German government. This grant terminated in December, 1984, leaving FENAPI without the resources to continue to employ its professional staff. FENAPI then requested AID and CA to restructure the contract to accomodate its new needs.

In January, 1985, after a series of meetings between AID/Quito, FENAPI and CA, a subcontract for FENAPI was drawn up. This new subcontract provided the organization with direct funds to hire staff, and purchase office equipment, furniture and supplies for the remaining seven months of the contract. A second subcontract was implemented, this one with Benchmarks, a consulting firm that assists organizations to achieve their social development objectives. Under this subcontract, Benchmarks provides technical assistance and guidance to the project's activities under Tasks II, III, and IV.

In addition, the restructuring of the project's funding necessitated the condensing and refining of the original eight tasks. The following four tasks were thereby identified.

TASK I	Development of a computerized national register including the purchase of a microcomputer for FENAPI
TASK II	Development of promotional and public information materials and public relations strategy for FENAPI leadership
TASK III	Technical assistance in the development of membership services for the affiliated chambers in the provinces
TASK IV	Implementation of technical assistance in leadership and organizational development

ACCOMPLISHMENTS

TASK I COMPUTER SERVICES

1. An assessment of the information needs of the Federation and a revision of the membership questionnaire were completed. The assessment was conducted through visits to the eighteen chamber members and meetings with FENAPI leadership, and resulted in a questionnaire that requested information and feedback. (See Appendix A.)

2 Computer specifications and guidelines for systems design were developed. (See Appendix B.)

3. An IBM XT Personal Computer, considered to be the most appropriate system for FENAPI's information processing needs, was purchased. Software packages in word processing, database management and financial planning were purchased. AID assumed responsibility for the purchase and shipment of the equipment.

4. In March, 1985, FENAPI administrative staff received training in basic word processing and were introduced to the IBM PC system in a four day training seminar.

5. Dr. Paul Hoover was hired as the computer specialist responsible for the development and design of FENAPI's computer program. Dr. Hoover also provided technical assistance in the installation of the computer, the training of technical staff and the utilization of the computer services.

6. Technical assistance in the codification of the membership information for computer input was provided.

7. Delivery of the computer, although delayed due to customs problems, was made and the computer was installed at the FENAPI offices in August, 1985. CA was in constant communication with Dr. Hoover, who explained that the delays were caused by difficulties with customs and a backlog of goods to be shipped through Eastern Airlines to Ecuador.

8. Dr. Hoover designed a database for the FENAPI membership information. The database was organized to allow for the extraction of statistical data as well as to provide direct mailing information. The database contains general information about the member businesses; basic information about the provincial chambers, a dictionary of products

produced by the small business sector; a cross reference table indicating which member companies produce which products; and a record of imported goods used in small business production of goods. (See Appendix C.)

TASK II DEVELOPMENT OF PROMOTIONAL AND PUBLIC RELATIONS STRATEGY FOR FENAPI LEADERSHIP

1. A preliminary assessment of the promotion and public relations needs of FENAPI's leadership was carried out. This assessment was conducted through site visits to the eighteen chambers, meetings with chambers and FENAPI leadership, and through conversations with representatives from the public and private sectors and from the national media.

2. A public relations strategy for FENAPI leadership was developed. This strategy consisted of the following components:

   a) The addition of a fulltime executive secretary responsible for the day-to-day administration of the organization and functioning as the central staff person involved with the project's planning and institutional strengthening tasks. Mr. Anibal Roballos was hired by FENAPI's president for this position.

   b) The development of a subcontract with FENAPI to facilitate the acquisition of the executive secretary. CA contracted to provide funds for the executive secretary salary and for office furniture, supplies, and equipment.

   c) The design, development, and dissemination of FENAPI's newsletter. In the course of the project the newsletter has expanded beyond the original intention of a two-page publication to be published quarterly to become a four-page monthly publication. (See Appendix D.)

   d) The hiring of a CA project coordinator in Ecuador at the beginning of the project to provide on site technical assistance to the organization in the development of its administrative and organizational procedures. This project coordinator is responsible for producing and disseminating the newsletter and for organizing technical assistance and training activities. FENAPI's president interviewed Mr. Blacio Bermeo for this position, and highly recommended him; subsequently, Mr. Bermeo was hired.

3. Implementation activities and a process for information dissemination were designed. A series of report analyses was produced by the project coordinator about on-going private sector and economic development strategies in Ecuador. These analyses have been distributed to the FENAPI leadership as briefing and policy papers.

4. The thematic framework for the workshops was developed. The themes selected by the FENAPI president were **Motivation** and **Lobbying**.

5. The FENAPI Leadership Institute concept was developed, taking into consideration all of the developmental needs of the leadership in FENAPI. A series of seminars was designed under its auspices to promote and strengthen FENAPI's leaders. (See report on Task IV for further details.)

6. Leadership training seminars in motivation and lobbying were designed, written, translated and held for the Pichincha and Azuay provincial chambers of FENAPI.

7. CA has completed the training of a cadre of Ecuadorean instructors to go into the field and provide leadership training to other Ecuadorean nationals in motivation and lobbying. One group will work in and around the Quito area, another in the Guayaquil area, and others in key locales around the country. CA has been successful in establishing an enthusiastic and skilled group of independent Ecuadorean leaders. (See Task IV section for further details.)

8. CA Ecuadorean project staff and the president of FENAPI traveled to the provincial chambers to meet with the leaders and members of FENAPI in an effort to become more knowledgeable about the many needs of the membership. (See Appendix E.)

TASK III ORGANIZATION AND IMPLEMENTATION OF TECHNICAL ASSISTANCE IN THE DEVELOPMENT OF MEMBERSHIP SERVICES FOR AFFILIATED CHAMBERS IN THE PROVINCES

1. A preliminary assessment of the membership needs for services and technical assistance was performed. This needs assessment was conducted through site visits to the chambers, chamber meetings and activities, and through conversations with FENAPI's leadership and representatives of the membership.

2. Training services were developed. The FENAPI Leadership Institute extended its services to the membership. This activity involved the design and development of training seminars and materials in membership motivation and lobbying. All of the materials produced were translated into Spanish and reproduced for all the seminars held during the year. (A detailed description of this activity is included in the Task IV section of this report.)

3. Dr. Donald Smith was hired as senior training advisor, responsible for the design and implementation of the training modules.

4. Lic. Bolivar Leon was hired as in-country training director with the responsibility of coordinating all of the project's training activities.

5. Technical assistance was provided for the development of annual membership conferences and extraordinary meetings. CA participated actively in the planning and development of the logistics activities for two major FENAPI conferences, the 1984 annual conference in Guaranda and the 1985 semi-annual meeting in Ibarra.

6. CA developed training modules on market analysis, management operation, business and finance. Training activities in these areas were cancelled due to project restructuring. (See Appendix F.)

7. CA researched established local and international programs in business management training that could be adapted to FENAPI's needs in business management training and development.

TASK IV IMPLEMENTATION OF TECHNICAL ASSISTANCE IN LEADERSHIP AND ORGANIZATIONAL DEVELOPMENT

1. Training activities were initiated. In November, 1984, the CA project staff from Ecuador and Washington, D.C., spent two weeks in Washington with the senior technical advisor, Dr. Donald Smith. They prepared a strategy for the design and development of a five day seminar for trainers. A primary concern was that the material would be appropriate for its intended Ecuadorean clientele.

2. A draft outline of the seminar's content was presented to FENAPI's leadership.

3. For each of the initial seminars, **Training** for Trainers, **Lobbying** and Motivation as well as for each of the follow-up sessions, a manual was drafted, incorporating transparencies, hand-outs and lesson plans. Each manual was first written in English, then translated into Spanish and thoughtfully revised by FENAPI to insure that its content was suited to its Ecuadorean audience. The manuals were field tested in the March seminars. Finally, the manuals were revised and edited again, in Ecuador by FENAPI leaders. The end products stand as three separate manuals, with transparencies included, each one for use with a particular seminar and its follow-up sessions.

4. The FENAPI president provided guidelines for the selection of training sites. Quito was determined to be the best place to begin the training. Future sites for both initial seminars and follow-up sessions were also selected: Cuenca in the south and Portoviejo in the north, as well as several other chambers in various locales, to facilitate the attendance of the membership from outlying provinces, thereby reinforcing the fact that they are an integral part of the program.

5. The dates for the training seminars were designated and the seminars were conducted by CA staff and/or FENAPI consultant trainers, as indicated in the explication in this section.

March 8-12, 1985:	Training for Trainers seminar (Quito)
March 15-17, 1985:	**Lobbying** seminar (Quito)
June 15-16, 1985:	**Lobbying** seminar follow-up (Cámara Babahoyo for participants from Babahoyo and Ventanas)
July 6-7, 1985:	**Lobbying** seminar follow-up (Cámara Ambato for participants from Tungurahua and Pastaza)

July 12-13, 1985: **Lobbying** seminar follow-up (Cámara de Pichincha)

July 22-24, 1985: **Training for Trainers** seminar follow-up (Quito)

July 26-28, 1985: **Lobbying** seminar (Quito)

July 26-30, 1985: **Training for Trainers** seminar (Cuenca)

August 2-4, 1985: **Lobbying** seminar (Cuenca)

August 2-4, 1985: **Motivation** seminar (Cuenca)

It is evidence of the strong motivation of the participants that in several of the follow-up sessions for which CA provided only the trainers and the materials, people willingly paid for their own transportation and lodging. The local chambers were encouraged to provide the space for the seminars and to contribute the food.

6. The **Training for Trainers** seminar was designed, conducted, and evaluated.

   a) FENAPI and CA agreed on the urgency of training a cadre of FENAPI members as trainers.

      The pilot Training for Trainers seminar was conducted in Quito, Ecuador, from March 8 through 12, 1985. Members of the organization with an interest in training, and some experience, if possible, were suggested as candidates. The president of the Federation selected eight participants, including himself, and all eight successfully completed the first seminar. Two of the group were university professors. They all benefited from discussing the theory as well as from putting it into practice. They became the leaders in subsequent workshops.

   b) Based on their performance during the training seminar, and their participation in the subsequent workshops with the membership, the new trainers were rated in the following way:

      OUTSTANDING: Bolívar León Salvador
      Blacio Bermeo Oliveros
      Luis Cueva Astudillo

      Subsequent workshops have been conducted, principally with these three individuals, whose support, dedication, and professionalism will be of great benefit to the Federation.

SUPERIOR: César Frixone Franco (President of FENAPI)
Aníbal Cevallos Castañeda
Juan Morales Oyarzún

ABOVE AVERAGE: Aníbal Rovayo Lemarie
Roberto Navarrete

c) FENAPI and CA identified Lic. Bolivar León as a most effective trainer and gave him the role of in-country training supervisor, assistant to the senior technical advisor, Dr. Donald Smith of CA. (See Appendix G for description of Lic. León's responsibilities.)

d) Dr. Smith, senior advisor, followed two steps, referred to as the Systems Approach to Learning, in designing the seminar:

Step one: Analyze the task(s) to be performed
Step two: State objectives based on the task(s)

e) Lesson plans were designed to meet the stated objectives.

(1) The planning was done in four phases.

(a) An analysis was made of the functions of an instructor.

(b) The functions were then delineated as the eight principal roles an instructor plays.

(c) An objective was designed for each role.

(d) A lesson plan was developed to meet each objective.

(i) Enlarged on the objective
(ii) Tested the attainment of the objective

(2) The goals of the Training for Trainer's seminar were identified.

(a) The main goal was to assure that the FENAPI trainers could explain in detail the definition of training by presenting lessons to other FENAPI members who planned to become trainers.

(b) Specific sub-goals were elaborated:

- to improve the participants' communication techniques

- to improve the participants' utilization of appropriate teaching techniques, aids and equipment

- to improve the participants' ability to select the appropriate leadership styles and interpersonal skills

- to improve the participants' ability to organize and plan effective lessons

- to improve the participants' ability to recognize individual differences in learners and react accordingly

- to improve the participants' ability to teach the Federation's training program

(3) The format for the lesson plans for the Training for Trainers seminar was designed.

(a) The topics to be covered were these:

- Introductions

- Review of training, based on its definition

- Trainer as communicator

- Trainer as learner

- Trainer as educator

- Trainer as organizer

- Trainer as planner

- Trainer as leader

- Trainer as manager

- Trainer as model

- Teaching demonstrations, preparation, delivery, evaluation

- Participant evaluation of Training for Trainers seminar

- Recognition for participation in FENAPI's training modules

(b) The day by day content of the lesson plans was developed.

- On day one of the seminar, the role of communicator and the need for open and clear communication would be discussed. In the afternoon, each participant was to be given time to prepare and deliver a fifteen minute speech, on any topic, using the techniques of effective oral communication.

- Day two would develop two roles of the instructor: learner and educator. During the theory portion of the day, the various tasks performed by members and leaders of the Federation were to be listed. The point of this day was to prove to the participants that in order to be an effective educator one must first learn about the learner: where he or she is coming from, where he or she is now, and where he or she expects to go. Once one understands the learner then one is ready to begin teaching.

- Day three was to focus on two more aspects of being a trainer, the roles of organizer and planner. The theory portion would demonstrate the need for organizing effective learning objectives as the basis for all training, and the objective then would be to plan a formal but flexible lesson plan, which would identify all the necessary skills and knowledge required to achieve the objective, the methodology to be used to bring this about, and the aids required to support the training activity.

- Day four would deal with the roles of leader and manager. Today's trainer must be both. The application of various interpersonal skills would demonstrate how the trainer should manage the learning environment; six of these skills would be identified, and applied to the various styles of leadership that the trainer must adopt depending on the subject matter, the level of maturity of the students, and the circumstances and/or constraints under which the training would take place.

- The last day, day five, would begin with a review of the course up to date, and then the last role, that of model, would be dealt with. The trainer would have to practice what he taught; thus, he would have to be the model instructor. (There was no intent to indicate that one role is more important than another. All are essential, and the last day was intended to put them all together.)

(c) This seminar was designed to be practical with the immediate application of the learning as its basic objective. Therefore, the workshop would be carried out by spending the morning dealing with the theory of training, and the afternoon applying that theory, using as the vehicle the training modules which the participants would be delivering the following week.

f) Training aids were projected, designed, and created.

(1) They centered around the use of handouts, which were to be presented to the participants after the learning session, transparencies which outlined all the essential content of the seminar, flip charts and chalkboards, and the most important training aid, the participants themselves, through their active participation and willing involvement.

(2) The training materials were prepared in the following manner.

(a) The senior technical advisor developed his lesson plans, and from them designed a handout booklet for the participants.

(b) He also identified the material which was to be converted into transparencies.

(c) He sent copies of this material, already in Spanish, to CA in Washington, where it was reviewed, edited and presented for delivery in Ecuador.

(d) When he left in March for Quito, he carried with him his own lesson plans, a complete set of transparencies to be used in the course, and fifteen booklets containing the handouts for the participants.

(e) Any other aids found to be necessary were to be supplied at the training site.

g) A pilot program was field tested, the suggestions and comments of the participants formed the basis for revisions, and through the evaluation the seminar was validated.

(1) The course evaluation provided to CA indicated that the pilot program met its objectives, and most certainly the objectives of the participants. (A description of the evaluations follows the report on the course in Cuenca).

(2) Recommendations were made in the April evaluation report.

(a) The first stated that no major changes in the seminar were required, the theory in the morning followed by practical application in the afternoon was a most acceptable format.

The degree of participation and involvement and the methodologies and aids used were more than adequate. Such positive comments indicated that no changes were necessary before the Cuenca seminar.

(b) The second recommendation stated that Quito should not be the only locale in which to conduct this training. From July 22-30, the second seminar on Training for Trainers was conducted in Cuenca, to cover the south and its coast, and there are plans to conduct a third program in Puertoviejo, to cover the north and its coast.

(c) A third recommendation was that a follow-up seminar be conducted with the first group of trainers, which was done July 22-24, 1985, in Quito, before the second workshop for trainers in Cuenca. The new training module on motivation was used effectively as a practical application of that suggestion.

(d) A fourth recommendation identified the need to establish a resident trainer position. This position has been established and is currently being filled by Lic. Bolívar León.

(e) A final recommendation requested an extension of the initial one year. One year can only

initiate a program; several are needed to firmly establish it. FENAPI could then be left with an in-house capability to train their own instructors, develop their own programs, and evaluate for themselves their effectiveness.

h) A second Training for Trainers seminar was conducted for FENAPI leaders in Cuenca, where a new group of fifteen leaders was trained.

(1) On the same day, July 26, 1985, that the Lobbying seminar was beginning in Quito, a Training for Trainers course began in Cuenca. Fifteen participants were invited, and eleven attended. Of the eleven candidates, ten were excellent, and participated successfully in the two subsequent workshops on lobbying and motivation. Credit must be given to Lic. Luis Cuevas, from Cuenca, who participated in the first trainers' course, and then in the follow-up in Quito. As executive secretary of the chamber of Azuay, he worked hard to attract the best and the most dedicated people in his chamber for all three seminars.

(2) Most of the participants in the Cuenca Training for Trainers course had some experience in training and four were university professors. The Quito group had been excellent and we thought it could neither be surpassed nor equalled. The Cuenca group, however, was certainly as motivated, dedicated and professional; this bodes well for the Federation; now two groups of highly trained and excellent trainers can carry the message to the membership of the Federation. The Cuenca group was enthusiastic and a pleasure to work with: attendance remained constant; the discussions achieved remarkable participation and relevance; the teaching demonstrations and applications of the theory were professional and entertaining. The workshop was carried out, once again, by spending the morning dealing with the theory of training, and the afternoon with the application of that theory - the application being the utilization of the content of the lobbying and motivation workshops in which the participants would be training. The content of the course as well as the methodologies were the same as those used in Quito in March.

(3) Based on their participation, demonstrations and involvement in the Training for Trainers workshop, as well as on observations of them instructing during the Lobbying and Motivation seminars, the new instructors in Cuenca were rated as follows:

OUTSTANDING (surpassed all objectives)
Julio Jaramillo
Rene Osorio
Gustavo Cardoso
Gerardo Arévalo

SUPERIOR (surpassed most objectives)
Wilson Cabrera
Jorge Paredes

FULLY SATISFACTORY (surpassed some objectives)
Nancy Arévalo
Miguel Crespo
Enmanuel Manzano

SATISFACTORY (met all the basic objectives)
Herminio Arévalo

i) Evaluations of the Training for Trainers program to date and recommendations concerning subsequent plans were compiled.

(1) Following is a quantitative breakdown of the evaluations as presented to CA by the participants on the Quito and Cuenca Training for Trainers courses. This breakdown demonstrates the participants' degrees of satisfaction and achievement.

	OBJECTIVE	QUITO	CUENCA
1.	Improvement in communication techniques	93%	98%
2.	Improvement in utilization of appropriate teaching techniques, aids and equipment	93%	96%
3.	Improvement in the ability to select the appropriate leadership styles and interpersonal skills	95%	94%
4.	Improvement in the ability to organize and plan appropriate lessons	98%	88%
5.	Improvement in the ability to recognize individual differences in the learners, and react accordingly.	88%	96%
6.	Improvement in the ability to teach the seminars on lobbying and motivation	88%	94%
7.	Practical content	90%	100%
8.	Logical presentation	100%	100%
9.	Preparation and organization of the instructor	100%	100%
10.	Practical presentations of the instructor	96%	100%
11.	Allowance for group participation	100%	100%
12.	Confirmation given by the instructor	93%	100%
13.	Congruence of the instructor	95%	100%
14.	Feeling of individual acceptance and appreciation by the group	88%	98%
15.	Environment conducive to learning	90%	96%
16.	Appropriate training aids	95%	96%
17.	Degree of overall satisfaction with the training	90%	94%

(2) The most outstanding elements identified by the participants for the two offerings of this workshop were as follows:

- "awareness of a trainer's need for motivation"
- "the need to appropriately manage the learning environment"
- "all of the points presented were outstanding"
- "the logic in the process of training, and the freedom of expression"
- "the fact that FENAPI has an excellent group of trainers"
- "organization and lesson planning"
- "enthusiasm and participation"
- "planning and leadership"
- "the opportunity to improve my skills"
- "the techniques of effective training"
- "everything"
- "the active participation and the opportunity to practice"
- "the shared experience of all the participants"
- "the practical applications"
- "the fact that everything in the seminar exceeded my needs"
- "everything was most interesting"
- "the magnificent communication"

(3) Changes suggested by the participants were

- "more linking with the world of FENAPI"
- "further amplification of some of the points discussed"
- "since the workshop achieved a complete success, there is no need to change anything"
- "it seems to me that this course covered everything for everyone"
- "not a one"
- "more time for practice"
- "a longer workshop"
- "better utilization of time - start earlier, stay longer, and have shorter lunch breaks"
- "more days but fewer hours per day"
- "more time given to audiovisual aids".

(4) The Training for Trainers workshop has now been conducted successfully twice in Ecuador, and it would appear that it more than satisfies the needs of FENAPI. Now that a resident trainer has been identified and hired by CA to coordinate all training within the Federation, more follow-up and evaluation of the training to date can take place. It is also recommended that another group of trainers in Portoviejo be trained, to cover the north and coastal section of the Republic. Once this is done, a team of up to thirty well-trained and motivated instructors will be able to reach all the members of the Federation, and as new modules are developed to meet the needs of the membership, they will be delivered efficiently and effectively by this resident team.

(5) Although the participants have rated the seminars favorably, we know that the real proof of the effectiveness of the training will be the transfer of the learning into the work environment. Therefore, follow-up evaluations should be conducted within at least six months, to see if the objectives of the workshops have had an impact, as was intended, on the Federation as a whole. The intent of training is not only to provide a feeling of satisfaction, which is certainly important, but also to provide the skills and the opportunity to do the job for which the training was designed.

7. A follow-up workshop for the Training for Trainers seminar has been conducted, using trained FENAPI members.

a) CA, based on one of the recommendations reported above, has developed a three-day follow-up training program, which was conducted July 22-24, as a pilot, in Quito. Of the original eight trainers, trained in March, six returned to participate. For this program each of the three days had its own theme, and the practical application in Quito was an in depth study and analysis of the new training module on motivation.

(1) Day one comprised a review of the key material from the first training course for trainers. Its stated objective was "At the completion of day one, the trainers will be able to identify and explain the

principal parts of the first training session: the concept of training; techniques to improve oral communication; characteristics of the learner; needs of the learner; seven factors which affect learning; how to maintain motivation; qualities of well designed learning objectives; outline for a lesson plan; advantages of interactive instruction; leadership; interpersonal skills; and attributes of ethical behavior.

(2) Day two introduced new material. Its stated objective was "At the completion of this session, the trainers will be able to apply some new concepts concerning training, and will begin to practice the content of the new material. The new concepts included the impact of changes in society on training; learning in the new age; the high-performance trainer; some new techniques to transfer training into practice; and an emphasis on the fundemental principals of training.

(3) Day three centered around the concept of excellence in training, based on leadership. Its stated objective was "At the completion of the third day, the trainers will be able to practice some new concepts in order that their training will achieve excellence resulting in improvements within the Federation". These new concepts included a test for excellence for the Federation; treating learners as individuals; new rules for training; twenty-six guidelines for the Federation; exercising leadership as well as management; and characteristics of an excellent trainer/leader.

b) These three days of training in July were well received as was the content of the new seminar on motivation. The training follow-up was carried out in a seminar/workshop format, and the participants had ample time to plan for the upcoming workshops in Quito. No formal evaluation was conducted for this first follow-up, but the proof of its effectiveness was demonstrated in the subsequent workshops with the members of the Federation.

8. Leadership training was structured to focus on two separate components identified as being important for FENAPI members.

a) Lobbying
b) Motivation

9. A separate seminar for each component was designed, conducted and evaluated.

a) Lobbying

(1) Identification of focus

During the Fall of 1984, a series of studies was conducted with FENAPI to identify what training needs were apparent within the Federation. The area that was suggested as the most essential, and one that could to be a pilot for further training, was the art of lobbying. Motivation was also suggested, but it was decided to wait until the lobbying training was validated before embarking on more training, which proved to have been a wise decision. A Washington expert in the field of government lobbying was hired to design a three day module on the topic, and its English version was considered to have been well designed. CA then translated the modules, and they were forwarded to L. Bolívar León in Ecuador for him to incorporate into them references to Ecuadorean culture and current events. This was done, and in March of 1985, the three day seminar was presented in Quito.

(2) Content of Lobbying seminar (Quito)

The Art of Lobbying was a three day seminar which covered the following topics:

Day One - How to influence legislation or the government in favor of the Federation

Day Two - The development of an organizational structure in order to be able to influence the laws and policies of the government

Day Three - The basic concepts of lobbying

The seminar was designed to be a workshop providing an opportunity for the participants to design action plans for the various chambers which they represented.

(3) The primary objectives of the seminar

- to structure a tentative agenda for the activities and/or changes the participants wanted to implement in the government

- to apply the knowledge acquired through the seminar for the improvement of the provincial chambers

- to apply and utilize the knowledge acquired in order to obtain political backing at the local level, and later at the national level

- to be able to present clearly the organizational objectives of their chamber to a government official or to any other private or public figure

(4) Description of pilot Lobbying workshop (Quito)

The pilot Lobbying workshop was conducted in Quito on March 14, 1985. The participants were invited from several provincial chambers, and twelve attended the workshop, which was held in the Hotel Quito. Most of the group was quartered at the hotel which added to the camaraderie. Lodging, transportation and meals were provided to participants and trainers.

(a) On day one FENAPI's president welcomed the participants. He explained the thrust and the objectives of the AID-CA/FENAPI project, especially its training objectives. He emphasized the need to strengthen the leaders at the local level and their need to know how the laws are made, and how they work for the benefit, or to the detriment, of the members of the Federation.

Mr. Bermeo, one of the two local CA representatives, introduced himself and explained that he would act as an additional instructor for the workshop, introduce each session, and at the end of the day, assist the group to come to positive and relevant conclusions leading to the formulation of action plans. He then presented an outline of the day's objectives:

- to define the meaning of lobbying

- to describe the legislative process and how a legal initiative in Congress becomes a law

- to identify those who are responsible for dictating the laws and initiatives that directly affect the Federation

- to structure a tentative agenda for the activities to be pursued at the government level

Lic. León was the presenter for day one, and his knowledge and experience made the day a success for the entire group. He began by introducing the concept of lobbying, and then he presented examples of the various instruments commonly utilized in the lobbying process. The instruments and methods demonstrated in the workshop reflected the business protocol of Ecuador. An overview of the Ecuadorean legislative system followed. Throughout this part of the training session, emphasis was given not so much to the theoretical configuration of the legislative process as to its application and when and where the participants' lobbying could be most effective.

In the afternoon session, Lic. León reviewed briefly the general concepts that were presented in the morning. He then divided the group into three sub-groups, to work as teams utilizing the handouts prepared for practicing the application of the concepts.

The day ended with a review and summary of the concepts learned and of the common goal. This goal was stated as "It is better to pursue one's goals and ideas in a group than as an individual". The closing remarks and evaluations from the participants indicated that the seminar was timely and appropriate for the day to day realities of small industries in Ecuador. Some even pointed out that a swing in leadership styles was coming, and that the seminar would help to prepare those in attendance to benefit from future opportunities.

(b) The morning session of day two began with a presentation of the conclusions and essential elements of day one, followed by an overview of the following objectives for day two:

- to discuss the need and functions of an administrative organization and its executive personnel

- to explain the operational needs and the mechanisms involved in the working of an executive committee, board of directors and working committees

- to describe the possible structure of an implementation committee and working committees

- to define the role of a working group within the organizational structure

- to determine the financing mechanisms to be utilized in the organization's administrative offices

Day two was conducted by two of the recently trained trainers, and the session opened with a request for each participant to describe the current level of development of his provincial chamber. The basic elements or main objectives that should be considered, regardless of the size of the provincial chamber, in the establishment of a sound organizational structure were then presented. This list of recommendations was made more relevant by the presentation of a graphic sketch of the ideal administrative/organizational format of a provincial chamber. The group was then divided into two subgroups, or teams, one working on the delineation and configuration of a small provincial chamber; the other, on the delineation and configuration of a larger provincial chamber. The afternoon was spent on designing these configurations and then presenting them to the entire group.

The thrust of day two was to demonstrate that to initiate any action, one must have clear objectives, and that through a follow-up/control/evaluation process, one could realize tangible results that could benefit the provincial chamber and its members.

(c) Day three began with a presentation of the conclusions and essential elements of the previous days, and emphasisized that with a good organizational structure to support the work of each provincial chamber, the Federation would be able to achieve greater things for its membership. Then the objectives of day three were introduced.

- to develop a network at the local level from which the participants can derive strength and clout

- to set up a meeting with a government official or any other important political figure, and to identify the strategies to be explored, including those of preparation, meeting, participation and follow-up

- to identify those facts and variables which may affect the manner in which decisions are made

- to describe in writing, clearly and efficiently, the provincial chamber's concerns

Day three utilized three of the new instructors who provided the participants with varied presentations and individual assistance with their plans. The session started with a review of the definition of lobbying and its implications for small business in Ecuador. Next came an explanation of how to determine the problems facing one's chamber, how to identify the key persons involved, and how to elicit support to develop solutions. With the necessary support, it was explained, one can move to increase both personal influence and the influence of the provincial chamber. This part of the session was followed by an opportunity for each member to share individual views on the points covered, and suggest strategies for acquiring or augmenting a favor on behalf of a small business or a provincial chamber.

The afternoon session centered around the following essential components of lobbying: knowing the history of the Federation and the people who currently manage it; being aware of times, dates, and statutes; collaborating with the growing infrastructure of the local provincial chamber; using one's own personal contacts when appropriate and necessary; and utilizing appropriate techniques when approaching a legislator. An open and animated dialogue resulted from the presentation, and the rest of the afternoon was spent in the sharing of individual and province-wide experiences. The day concluded with the group designing a set of practical recommendations for successful lobbying for the small business community.

The Lobbying seminar ended with the conferring of diplomas on the participants from both the Training of Trainers' seminar, and the Lobbying/Leadership seminar. The CA project

director and the president of FENAPI handed out the certificates, and praised all the participants for having made the pilot training programs so successful.

A quantitative analysis of the Lobbying seminar follows the description of the training in Cuenca.

(5) Description of follow-up workshop

All six participants in the follow-up workshop on the training of trainers, July 22-24, 1985, in Quito, were to be involved in two workshops the following weekend, July 26-28; one on lobbying, the other on motivation. However, due to organizational problems in the Pichincha chamber, only one workshop was conducted, the one on lobbying. Of the twenty-two persons who were to have attended, only seven participated. The Lobbying workshop was shortened to two days, and the oral feedback was positive, but the lack of commitment on the part of the Pichincha Chamber left a lot to be desired. This situation was later discussed, and it was agreed that the problem was not so much a training problem, as a problem with personalities and a lack of organization. A detailed set of tasks was designed for the two CA representatives in Ecuador, aimed at eliminating any repetition of such an experience.

(6) Description of second Lobbying seminar (Cuenca)

This seminar was conducted August 2-4, 1985, in the meeting salon of the Azuay chamber, in Cuenca, as was the seminar for the new trainers. The format was identical to the one described above (the pilot in Quito in March) and was coordinated by CAs' local training coordinator. Six of the new trainers from Cuenca participated in the workshop, with Lic. León, Mr. Bermeo, and Mr. Cuevas acting as instructors. The only new element was the use of transparencies created by the instructors of the pilot, and developed in Washington.

A special note must be stated in regards to Mr. Luis Cuevas. Along with his regular duties as executive secretary for the Azuay chamber, Mr. Cuevas hand-picked the new instructors, and was ever-present during their workshop, offering them support, encouragement, and above all, a role model. It was also Mr. Cuevas who recruited the thirty participants for the other two workshops.

As most of the Cuenca participants commented, it was a real chamber effort. But Mr. Cuevas was the catalyst, and his involvement and commitment have brought a new definition to this term.

(7) Participants evaluations

(a) Quantitatively, the participants' evaluations from the Quito (March) and Cuenca (July) seminars indicate the following:

	OBJECTIVE	QUITO	CUENCA
1.	Improvement in their ability to structure agendas for change	73%	84%
2	Application of the new knowledge in their respective chambers	91%	91%
3	Skill in applying this knowledge at the local and national levels	65%	89%
4	Improvement in writing skills	85%	89%
5	Practical general content	85%	90%
6	Logical presentation	75%	96%
7	Preparation and organization of the instructors	85%	93%
8	Allowances for group participation	92%	93%
9	Practical presentations by the instructors	85%	97%
10	Confirmation given by the instructors	82%	93%
11	Feeling of individual acceptance and appreciation by the group	90%	91%
12	Environment conducive to learning	90%	96%
13	Appropriate training aids	85%	94%
14	Congruence of the instructors	90%	97%
15	Degree of overall satisfaction with the workshop	89%	97%

(b) The most outstanding elements, as identified by the participants for the two recorded offerings of this workshop:

- "how to influence"
- "how to reach the necessary objectives"
- "the art of lobbying"
- "relationship between the directors and the various sectors"
- "planning"
- "structure of the chambers"
- "how the chambers should function"
- "the techniques used to obtain the objectives"
- "the need for planning and having objectives"
- "how to help the membership"
- "the various types of action within the chambers"

- "how to achieve objectives"
- "the cooperation between the new instructors and the chamber of Azuay"
- "the way the instructors reached the participants"
- "the concept of lobbying"
- "how to achieve objectives"
- "how to acquire union among members"
- "how to influence the government"

(c) Changes suggested by the participants:

- "not a one"
- "more examples to support the theory"
- "make the workshop more intensive"
- "clarification of some of the forms"
- "fewer interventions off the topic"
- "further amplification of some of the themes"
- "more audiovisual material"
- "more variety in instruction"
- "longer seminar"
- "more time for discussion"
- "a seminar on motivation"
- "better continuity between the chamber and the members"
- "everything was great"
- "give the workshop in other provinces as well as in Azuay".

b) Motivation

The pilot of the Motivation seminar was conducted in Cuenca, and ran concurrently with the seminar on lobbving. Five of the new instructors trained in Cuenca participated in the delivery, along with three of the original trainers; two from Quito and one from Cuenca.

(1) Goal of workshop

The overall goal of the seminar on motivation is expressed as follows: "Through discussion about the theory of motivation, and practical exercises relative to same, the participants will be able to improve the climate of motivation within FENAPI's membership, leadership, and organization as a whole."

(2) Description of pilot workshop

(a) Day one centered around the theory of motivation, and included the following topics: the importance of motivation; ways of looking at motivation; a systems view of motivation in organizations; the impact of past performance on

behavior; various integrative approaches; and a group activity, where the participants apply the theory to their real situations within the Federation.

(b) Day two concentrated on the concepts of motivation for the leadership of the Federation and leadership in general. Creative Associate's Ecuadorean staff set the stage with a practical and enthusiastic introduction to leadership during the morning session. A new instructor, the star of the workshops, Mr. Jaramillo, carried on in the afternoon, and was both motivated and motivating. Topics covered during day two included the following: defining leadership; the search for leadership traits; the behavior of leaders; situational factors in leadership effectiveness; contingency approaches to leadership; and, once again, a group activity, following the same format as day one.

(c) Day three centered around the need for maintaining open, clear and concise communication within the Federation. This is seen not only as the responsibility of the leadership of the Federation, but as the responsibility of all members as well as leaders. With the help of two of the new instructors, Dr. Léon successfully concluded the seminar on motivation. Topics covered during day three included the importance of communication, interpersonal communication, and communication in organizations; the session ended with a group activity: to design an action plan for implementing channels of communication within the Federation.

The Cuenca seminars ended with the conferring of diplomas on the participants of the Training for Trainers course, and the Lobbying and Motivation courses. The CA project director, Ms. Teresita Perez, and FENAPI president, M.C. Frixone, along with the local Chamber's president, Mr. Rómulo Ochoa, handed out the certificates, while praising the participants for their support, hard work and dedication.

(3) Evaluations

(a) Of participants: The participants were highly motivated small business entrepreneurs: a psychologist, a travel and tour agent, and the oldest son of Mr. Jaramillo, which created some

positive and interesting interactions. The younger Jaramillo was obviously proud of his father's performance, as well he should have been.

Based on observation of their participation, demonstrations, involvement in the training for trainers' workshop, and their instructing during the lobbying and motivation seminars, the new instructors were rated as follows:

OUTSTANDING (surpassed all objectives)	Julio Jaramillo Rene Osorio Gustavo Cardoso Gerardo Arévalo
SUPERIOR (surpassed most objectives)	Wilson Cabrera Miguel Crespo Emmanuel Manzano
SATISFACTORY (met all the basic objectives)	Herminio Arévalo

(b) By participants:

(i) The participants were critical and constructive, and indicated the following degrees of satisfaction with the workshop and the achievement of the objectives:

OBJECTIVE	DEGREE OF ACHIEVEMENT
1. Explain the systems view of motivation in organizations	75%
2. Explain the behavior modification approach to influencing behavior in organizations	85%
3. Explain the process of leadership	83%
4. Distinguish between the two principal styles of leadership	82%
5. Describe three contingency approaches to leadership	74%
6. Outline a model of the communication process, and state the importance of two-way communication	78%
7. Explain how the barriers to effective communication can be overcome within an organization	85%
8. Improve the ability to better the motivational climate among the members and leaders of the Federation	85%

(ii) The most outstanding elements as identified by the participants, included the following:

- "the dedication of the instructors and participants"

- "the overall climate of motivation within the group"
- "communication and its importance within the organizations"
- "everything"
- "all the content"

  (The day on leadership was conducted by Mr. Bermeo and Mr. Jaramillo, and for six of the twelve participants, it was the outstanding element - a credit to both of the instructors.)

(iii) Changes suggested by the participants:

- "not a one"
- "more of the same"
- "no change, but more depth and time allotted"
- "more time"
- "another chance to come back for more"
- "more action plans"

It would appear that with this group at least, the seminar achieved its goal, and contributed to motivating these individuals. Five of them requested more time be given to the seminar, and this will be considered; the three days could become three different seminars, one on motivation, one on leadership, and one on communication.

CONCLUSIONS AND RECOMMENDATIONS

The CA senior technical advisor has formulated the following conclusions and recommendations concerning the training programs conducted by CA for FENAPI.

1. The Training for Trainers seminar is meeting the needs of the Federation. An excellent cadre of instructors has been trained in the basic skills of adult education, and should be able to serve the provinces in the central, southern and coastal sections of the Republic.

2. Lic. Bolivar Léon, who has been appointed to the position of training coordinator for CA in Ecuador, has all the necessary skills and knowledge of a most effective trainer, as well as credibility within the Federation. He therefore has the potential to maintain the impetus that the training has achieved thus far.

   It is recommended that

   a) Lic. Léon spend more time evaluating the training conducted in the provinces and work with the local trainers to make sure that the training continues to meet the needs of the provincial chambers

   b) he work closely with the national component of FENAPI, since without their support, the training activities will not carry the necessary harmony and unity of purpose which are essential for a successful training organization

   c) he maintain close contact with the new trainers, and be available to assist them when such assistance is necessary and/or requested

   d) he continue to write articles for the FENAPI newsletter, which provides an opportunity for him to reach the entire membership of the Federation

   e) he follow as closely as possible duties which were listed for him in Ecuador, outlining for him the tasks which must be accomplished and reported upon

3) Regional training

The only area of the Republic not covered by the training component of FENAPI is the north and northern coastal section. Once this area is reached, the entire country should be able to maintain indigenous training.

It is recommended that

a) as originally planned, a Training for Trainers seminar be conducted in Portoviejo early in the new year so that the entire Federation will have equal opportunity for training, and the delivery of training will become a local function

b) Lic. León be responsible for the essential follow-up training for the FENAPI leadership.

c) in Quito, Cuenca and Portoviejo, regional training coordinator positions be established and coordinators be identified and utilized to work with the trainers in the respective regions, and to act as regional liaisons with Lic. Léon.

4) Seminars

The two workshops on lobbying and motivation, like the Training for Trainers workshop, are meeting their initial objectives. The need for training was recognized and the topics selected were excellent choices from which to launch the training activities.

It is recommended that

a) FENAPI continue delivering seminars in lobbying and motivation, and update the modules as changes become necessary

b) new modules be added to the training schedule, but only after a thorough needs analysis has been conducted

c) the needs analysis be conducted as soon as possible, preferably before the six-month extension has been completed, so that the three-year extension, which is anticipated, can prepare FENAPI to meet the needs of small businesses in the 1990s

5) Overall

Before concluding this report, several general recommendations must be added.

a) If the training effort is to be successful, the leadership of FENAPI must be involved; therefore, the presidents of each chamber must become more involved in the training activity, not only as participants in the various courses, but as providers of support and encouragement to their members to motivate them to attend the seminars.

b) If CA is to continue working with FENAPI, it will have to take a more participatory role with the Federation; managing from a distance meets neither FENAPI's nor CA's objectives to the degree that they could be met if CA had a full- time project officer in the office in Quito. This would give the office some stability, and the time to train a local representative to manage effectively and efficiently.

c) Encouragement should be given to the local trainers to participate in training with other local institutions; sharing training is one of the best ways to become trained. This will benefit both FENAPI and CA.

d) Often, when there is a problem in an organization, the remedy is training; however, in many cases, the problem cannot be resolved by training alone, but rather indicates a need for the management of the organization to develop alternative solutions. FENAPI needs time as well as training programs to solve its problems.

e) CA has made an excellent start with FENAPI but it is only a beginning. Training is an activity which is constant, ever-changing, and dynamic - FENAPI will always be in need of new programs, new trainers and new managers, and it is CA's task to provide the climate of motivation and support until the day that the Federation will become self-sufficient, able to motivate and support itself.

REPORTING

Throughout the course of the project, CA has provided detailed accounts of their activities in the FENAPI project. Three types of documents have been periodically produced and sent to the AID contracting officer, AID/Quito project offices and the FENAPI president.

These documents are as follows:

Quarterly Reports summarizing the activities of the project over the reported three month period, incorporating project activities in Quito and in Washington, D.C. Three quarterly reports have been produced and submitted. The fourth is incorporated in this report.

Trip Reports providing a synopsis of activities on CA's field visits related to project activities. There are trip reports for February, March, April, May, June, July and August.

Training Reports explaining the methodology, implementation and evaluation of seminar activities in Ecuador during the months of March and July, 1985. The July training report is incorporated into this document in the Task IV section.

These documents serve as evaluation tools and help clarify and direct the activities related to the FENAPI project.

EXTENSION OF THE PROJECT

During the past year a great deal has been accomplished. FENAPI has started to gain strength through the organization of its membership services and training services in lobbying and membership motivation. But this is only the beginning of the development, a great deal more is needed. The training and technical assistance services provided to FENAPI by CA have proven to be invaluable. A positive impact has been achieved but FENAPI and its membership need continuing support.

In April, 1985, a proposal for a six-month extension of the contract was submitted to Dr. Jim Finucane, Project Director for AID/Quito mission. The extension was granted in August, 1985, by AID to CA to continue providing its technical assistance to FENAPI. This extension runs from September 1, 1985 through February 28, 1986.

For a more detailed explanation of the activities included in the extension, see Appendix H.

APPENDIX A

F E N A P I

FEDERACION NACIONAL DE CAMARAS DE PEQUEÑOS INDUSTRIALES DEL ECUADOR

Quito, 24 de octubre del984
OFICIO Nº AC 26/018 - 84

De nuestras consideraciones:

Como es de su conocimiento, la Federación está recibiendo Asistecnia Técnica en base del Convenio FENAPI-AID-AC, que propende a revitalizar y promover el desarrollo de la Pequeña Industria y su membrecía en el país.

Este proyecto contempla entre sus partes, un capítulo de Capacitación Empresarial Múltiple, con el objeto de dar una motivación, estimulación y formación de los dirigentes de FENAPI y sus Cámaras Provinciales.

Con estos fines, me permito llegar a usted, para solicitarle muy encarecidamentesu colaboración y la de sus miembros afiliados, pues es nuestro interés conocer sus necesidades más concretas de capacitación, básicamente en los siguientes aspectos:

a.- financiamiento
b.- comercialización
c.- administración y organización industrial
d.- estudio y desarrollo de un plan de utilización de los talleres demostrativos para capacitación de pequeños industriales

Po este motivo, solicito nos envíe el tabón adjunto, indicando en orden las prioridades, cuáles a su juicio son las más importantes de recibir, tanto para la capacitación de dirigencia cuanto de empresarios.

En espera, Señor Presidente de que ésta petición tenga de parte de ustedes la mejor comprensión y acogida, le reitero los sentimientos de mi más alta consideración.

Atentamente,

Lcdo. Blacio Bermeo Oliveros

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F E N A P I

FEDERACION NACIONAL DE CAMARAS DE PEQUEÑOS INDUSTRIALES DEL ECUADOR

INFORMACION PARA CAPACITACION
PROYECTO ASISTENCIA TECNICA
FENAPI - AID - CA

A continuación, sírvase indicar en orden de prioridades cuá-
les de los aspectos descritos serían de su interés para rec-
bir la capacitación que se impartirá como parte de proyecto
FENAPI-AID-CA.

	DIRIGENTES (LIDERAZGO)	EMPRESARIO (MEMBRESIA
1.- Financiamiento	---	---
2.- Comercialización	---	---
3.- Administración y organización industrial	---	---
4.- Talleres demostrativos para capacitación	---	---

5.- Otros.....
.....
.....

FIRMA

FECHA

~~DATOS DEL AFILIADO INDUSTRIAL~~

NOMBRE DEL AFILIADO.....

CAMARA PROVINCIAL DE .....

SECTOR INDUSTRIAL.....

NOTA: FAVOR REMITIR A LA MAYOR BREVEDAD POSIBLE

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FEDERACION NACIONAL DE CAMARAS DE PEQUEÑOS
INDUSTRIALES DEL ECUADOR

Quito, 23 de octubre de 1984
OFICIO Nº AC 26/016-84

Señor Doctor
José Vicente Troya J.
SUPERINTENDENTE DE BANCOS
En su despacho.-

De nuestras consideraciones:

Me es grato dirigirme a usted, con el objeto de informarle que FENAPI, está recibiendo Asistencia Técnica - de un proyecto que trata de revitalizar y promover el desarrollo de la pequeña industria del país.

Este proyecto contempla entressus partes la realización de varios talleres de capacitación a nivel de liderazgo y otras eventos de carácter técnico que harán posible impulsar las actividades de los pequeños industriales y su membrecía.

Con estos fines Señor Superintendente, solicito a usted muy encarecidamente, se sirva autorizar a quien corresponda, nos facilite la información que maneja esa Superintendencia en lo referente a: Estadísticas de Crédito y financiamiento del Sistema Financiero y Bancario Nacional destinado al sector de la Pequeña Industria y Artesanía; la última Memoria ó Informe Oficial de esa entidad y otra información que pueda proporcionarnos.

En espera de que la presente, tenga de su parte la mejor comprensión y acogida, le reitero los sentimientos de mi más alta consideración.

Atentamente,

Lcdo. Blacio Bermeo Oliveros
COORDINADOR PROYECTO FENAPI-AID-AC.

BB/sv.

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A P P E N D I X B

FINAPI DATABASE-OVERALL STRUCTURE

DRAFT

FILES:

1) DIRECTORIO CAMARAS
   - Nombre
   - Direcion
   - Casilla
   - Ciudad
   - Provincia
   - Fono1, Fono2
   - Gerhente
   - Numero Afiliados
   - Numero de afiliados en cada sector

2) DIRECTORIO PRODUCTOS
   - Producto codigo
   - Nombre de producto
   - Sector de producto

3) DIRECTORIO PRODUCTOS IMPORTADA
   - Producto codigo
   - Nombre de producto
   - Sector de producto

4) DIRECTORIO EMPRESES
   - Camara codigo
   - Emprese codigo
   - Provincia
   - Canton
   - Parroque
   - Calle
   - Casilla
   - Fono
   - Representante nombre
   - Representante calle
   - Representante canton
   - Representante casilla
   - Representante parroque
   - Representante fono
   - Propio?
   - Fecha Afiliado

5) ACTIVIDADES-PRODUCTOS
   Emprese codigo
   Sector1, Sector2
   Produc. codigos (5?)
   Export status

6) ACTIVIDADES-IMPORTS/INPUTS
   Emprese codigo
   Producto codigo (5?)

7) ACTIVIDADES-CREDITO Y SERVICIOS
   Emprese codigo
   Regestrados
   Creditos
   Servicios

8) ACTIVIDADES-PERSONNEL
   Emprese codigo
   Numero administrative
   Numero production
   Numero sales

INPUT SCREENS

1) CAMARAS
2) DIRECTORIO PRODUCTOS
3) DIRECTORIO PRODUCTOS IMPORTADES
4) EMPRESES
5) ACTIVIDADES (One input screen for all 4 activity files)

NOTE: Almost all infomation will be entered only once. Where information such as the emprese codigo is repeated in different files, that data will be transfered by the software. The files suggested above represent what seems to me to be a logical segmenting of the data. This particular grouping does not limit access to the data. New files can be readily created by relating existing files in a variety of ways: files can be intersected, joined, appended, subtracted, etc. The directories of products can be built as data is entered. Product codes can be checked by the software against existing directory entries. If the code is not present, it and the product name can be added.

REPORTS

1)MAIL LABELS
2)PRODUCTS CLASSIFIED BY SECTOR
3)IMPORTS/INPUTS CLASSIFIED BY SECTOR
4)FIRMS CLASSIFIED BY PROVINCE
5)FIRMS (CLASSIFIED) BY PROVINCE AND/OR CAMARA USING CREDIT OR SERVICES
→ afiliadas?

NOTE: What I need is some idea of those reports which will be regularly desired. Ad-hoc reports can also be generated of course, but may not justify the time and effort required to develop a good looking format.

AUTOMATING THE SYSTEM

When the files, input screens, report forms, and coding have been completed and the system tested with sample data, menu screens and automation can be designed. A sample menu organization is shown below.

FINAPI DATABASE

MAIN MENU

---

1. ADD/UPDATE RECORDS
2. SELECT DATA
3. PRINT REPORTS
4. QUIT

UPDATE MENU	SELECT MENU	REPORT MENU
1. A/U CAMARA	1. S/ CAMARAS BY SECTOR	1. P/ LABELS
2. A/U DIR PROD.	2. S/ EMPRESE BY PROD.	2. P/ REPORT1
3. A/U DIR INRTS.	3. S/ PROD. BY SECTOR	3. P/ REPORT2
4. A/U ETC.		

Each of these menus may have again a sub menu which gives options, e.g. under A/U CAMARA the options might be the choices:

1. REMOVE A RECORD
2. UPDATE A RECORD
3. QUIT

If you chose to remove a record the screen would prompt for the data needed to select the correct record for removal, display the record and query if for certain you want the record removed from the database. If you chose to update, again data is requested with which to select the correct record and the data input screen would be displayed with the current record's values filled in so you could change those items to be updated.

Sample entry screen – empty

Push [ESC] when done with this data

DIRECTORIO EMPRESAS

DB: FINAPI

REL: EMPRESES

CAMARA CODIGO:

EMPRESE CODIGO:

EMPRESE NOMBRE:

PROVINCIA:

CANTON :

REPRES. NOMBRE:

PARROQUE :

CALLE:

CALLE :

PARROQUE:

CASILLA :

CASILLA:

FONO :

FONO:

PROPIO?(S/N):

FECHA AFILIADO:

FECHA COMPL:

---

with some data

Push [ESC] when done with this data

DIRECTORIO EMPRESES

DB: FINAPI

REL: EMPRESES

CAMARA CODIGO: 197

EMPRESE CODIGO: 12345

EMPRESE NOMBRE: Productos Quimico Deval

PROVINCIA: Loja

CANTON : Loja

REPRES. NOMBRE: Delgado Valdivieso Cornelio

PARROQUE : El Sagrario

CALLE: Pasaje Sichona Y Rocafuer

CALLE : Via Zamora

PARROQUE: El Sagario

CASILLA :

CASILLA:

FONO : 397-760

FONO: 09 622-791

PROPIO?(S/N): N

FECHA AFILIADO:

FECHA COMPL: 8/1/84

BORRADOR DE DATOS PARA EL SISTEMA DE INFORMACION PARA FENAPI Y REPORTES REGULARES

PROGRAMA 1

Afiliación de los socios - para ésto se utilizará la información del formulario de carnetización.

LISTADOS A) 1. Alfabético Nacional de Empresas
2. Alfabético Nacional de Empresarios (Representantes)
3. Alfabético Provincial de Empresas
4. Alfabético Provincial de Empresarios

B) Sectores

1. Alfabético Nacional de Empresas
2. Alfabético Nacional de Empresarios
3. Alfabético Provincial de Empresas
4. Alfabético Provincial de Empresarios

C) Empresas

1. Nombre
2. Dirección completa

D) Representante

1. Nombre
2. Dirección Completa

E) Sector que pertenece

F) Quiénes utilizan servicios del Sector Público

- Por Provincias
- Por Sectores

G) Quiénes reciben servicios del SECAP-CENAPIA-B.N.F. IESS-BCOS.-FINANCIERAS - BNCOS PRIVADOS-INEN

Sectores:	Alimentos	31
	Textil y cuero	32
	Madera	33
	Gráfico y papel	34
	Químico	35
	No Metálico	36
	Metal Básico	37
	Metal Mecánico	38
	Otras Industrias	39

..../....

H) Quiénes utilizan servicios de instituciones de Crédito Por Provincia.

	SI USA	NO USA
Sectores: Alimentos		31
Textil y cuero		32
Madera		33
Gráfico y papel		34
Químico		35
No Metálico		36
Metal Básico		37
Metal Mecánico		38
Otras Industrias		39

I) Cuánta mano de obra utilizan

1.

SECTORES	M.O. CALIFICADA	NO CALIFICADA
Alimentos		31
Textil y cuero		32
Madera		33
Gráfico y papel		34
Químico		35
No Metálico		36
Metal Básico		37
Metal Mecánico		38
Otras Industrias		39

2. Por Provincia .....

J) Clasificación de productos

Qué producen: Por Provincia
Qué producen: Por Sector

K) Para exportación:

Qué productos
Qué Sector

L) Materias Primas:

Nacionales

Productos
Provincia

Importadas

Productos
Provincia

2. PROGRAMA DE PROMOCION DE EXPORTACIONES
(BORRADOR)

Para ello se deberán utilizar nuevamente las encuestas correspondientes al estudio de "Promoción de Exportaciones de Productos de la Pequeña y Mediana Empresa", realizado por FENAPI en 10 Provincias del país y que contiene aproximadamente 48 - preguntas y 1.100 encuestas; para realizar otras cruces de variables y obtener otros índices y resultados. Esta información dispone FENAPI.

3. PROGRAMA CONTABLE Y DE CONTROL PRESUPUESTARIO

Los resultados que se esperan obtener son:

- Balance trimestral y anual
- Flujo de Caja
- Liquidación del presupuesto anual
- Control de presupuesto por proyectos

4. SERVICIOS DE COMPUTACION PARA LAS CAMARAS PROVINCIALES

Se podría vender servicios cuando las Cámaras necesiten hacer listados de información a sus miembros ó de sus contabilidades y sus costos de operación y otros que requieran.

5. PROCESAMIENTO DE LA PALABRA

Elaboración de cartas a las Cámaras y Núcleos.
Boletines de Prensa, reproducción para las Cámaras y archivo en diskets.
Boletines indormativos, reproducción para las Cámaras y archivo en diskets.
Comunicaciones: realizar un archivo electrónico de los oficios enviados y recibidos en FENAPI.

6. PROGRAMA DE CONTABILIDAD Y DE CARTERA, PARA COOPERATIVAS DE - AHORRO Y CREDITO.

APPENDIX C

Database Development and
Office Automation for
FENAPI

Report and Recommendations
by
Dr. Paul S. Hoover

The major database at FENAPI contains information about members, that is, small industries and businesses in Ecuador. Once automated, the database will be used to extract statistical data, e.g., the number of metalworking shops with more than 5 employees, to target particular subgroups of associates for services, and to support services to the local "Camaras" to which members belong. Member data are presently on survey forms and a major task will be codifying and entering these data.

The membership database has been designed to include all information on the existing forms. In addition, information about the Camaras has been included. Tables in the database are the following:

Empresa--general information about the business: name, address, telephone, representative, ownership, number of employees, camara, and date of affiliation. These data are entered using a specially designed on-screen form which will help insure accurate entry from the paper forms. Each firm must be given a code which is <u>not</u> on the present paper forms. This "empresa codigo" appears in each table and is the manner by which data in different tables can be linked when reports are generated or inquiries made. This code does not have to have any special significance. It only needs to be unique for each firm.

Dictprod--a dictionary of products which gives a product code in one column and the product name in a second. Both imported and exported products and materials will be be codified for entry. The dictionary will translate the codes into product names. A major task will be assigning codes to the products presently listed on the paper forms. This categorization must be consistent to be useful. Before much data is entered in the product tables (see below), a sample of 100 or so products listed on the paper forms should be codified to explore the problems involved in the process of categorization. NB-entry of the Empresa data (above) can go ahead even while the product categorization process is being developed and tested.

Proprod--the sector and products produced by the firm. This table will simply have the firm code and product codes.

Impprod--products and materials imported by the firm, again simply the firm code and product codes.

Servrep--services used by the firm including credits or loans, and registrations in various organizations.

Camaras--name, address, phone and major officers of the camaras.

Each table has a data entry form. Although data is entered and related in separate tables, all data can be linked. For example, listing the names and addresses of producers of bread products in the provinces of Loja and Cotopaxi requires linking the data in the Proprod table with that in the Empresa table. This can be accomplished by "joining" the two tables using the firm code which is common to the tables and then "selecting" for those firms which are in the two provinces <u>and</u> which have the product codes for bread products.

If one is familiar with the database software, manipulating data is quite straightforward. However, for casual users, taking the further step of creating menus, prompt messages, and help screens makes the data accessible without any significant knowledge of database software. I recommended that this be done for this application at FENAPI. However, for me to do this work would have required much more than the five days available. What I have done, is to design the database, design the menus, organize the data into the above tables, create the major data entry screen, and the overall system plan for implementing a menu driven system.

My recommendation is that Sr. Nelson Navas, information analyst at FEDEXPOR, be hired to complete this work and implement the menu driven system. He has gained extensive experience with RBase, the database software, has implemented a menu driven system for FEDEXPOR, and has shown himself to be a hard and reliable worker. Roughly six weeks of part time work (approximately 100 hours) will be required to implement and test the system. An additional 30 hours should be allocated for modifications and additions, new reports, for example, and to training following implementation. Nelson can develop the system using FEDEXPOR's equipment which is entirely the same as that at FENAPI. If he can start as soon as possible, I can spend some time with him reviewing the implementation when I am next in Ecuador.

The following are additional recommendations based on my experience with other Ecuadorian organizations and limited conversations with FENAPI staff.

Creative's plan to have an individual familiar with data processing and with organizing information work with FENAPI over a period of several months is a good idea. Smaller organizations in Ecuador do not seem to have had much experience organizing data or information for rapid retrieval and analysis. Automation will only work well when the paper systems being automated are carefully thought out and functioning. By introducing computers one asks for a major change in both how information is used and in how the organization functions. Providing assistance while the transition is being made is essential for success.

It would be a good idea for this person to be famliar with the software and hardware FENAPI will be using. Because Creative Assoc. does not have the software, I suggest that Anne spend a few days here working with the software (database, word processing, and spreadsheet) and with the major database application prior to starting work with FENAPI. I can asssit her rapidly learn the software and familiarize her with FENAPI's information needs. Lodging is very inexpensive here, (about $25/day at a local country Inn).

While the major database application will be menu driven and require little knowledge of the database, I recommend that one or more staff at FENAPI be trained to use the database software for creating new applications. There inevitably will be new applications FENAPI will want to implement but they are unlikely to implement new applications if it is necessary for them to seek outside assistance every time. Training will also be required for the word processing and spreadsheet software.

The final software area that has been discussed, but not resolved, is accounting. Accounting software is available locally written for Ecuadorian organizations. What is not clear to me is how well this software can meet the specific needs of FENAPI. I would suggest that Anne become aquainted with FENAPI's present accounting practice and assist them evaluate locally available software. If this software is inadequate, US accounting software can probably be adapted, or bids for custom software development in Ecuador could be requested. It is quite likely that the accounting system, like the present system for handling information, will require considerable updating and revision before automating.

A P P E N D I X D

INFORMACIÓN fenapi

ABRIL / MAYO
1985

Federación Nacional de Cámaras de Pequeños Industriales del Ecuador

Editorial

IMPORTANCIA DEL DESARROLLO ECONOMICO DE LA PEQUEÑA INDUSTRIA EN LA REACTIVACION DE LA ECONOMIA ECUATORIANA

En nuestro país, sobre todo actualmente, mucho se habla de la Pequeña Industria, como uno de los sectores más importantes de la economía ecuatoriana.

Cuántas cosas pueden decirse en favor de la Pequeña Industria, así como la atención y apoyo que se le puede dar, habida cuenta de la significación que ésta tiene, y que podríamos resumirla en:

- La pequeña industria y artesanía generan empleo en corto plazo, característica de gran importancia en un país en vías de desarrollo; por lo que, una política que motive e incentive la generación de puestos de trabajo impulsaría las actividades y la organización de este sector productivo.

- La pequeña industria tiene una vital importancia para el desarrollo socioeconómico nacional, porque constituye el laboratorio en que se combinan nuestras auténticas realidades y sus fuerzas más vitales.

- Es también un engranaje para el desarrollo social y económico de un país, no sólo por el gran aporte en fuentes de trabajo, dando más empleo por unidad productiva que la gran industria, sino también por su capacidad de creación, su contribución al desarrollo de nuevos empresarios y lo que es de gran importancia, sus posibilidades de complementación con industrias grandes y de su propio estrato.

Por otra parte, está comprobado que en todos o en la gran mayoría de los países, se necesita por lo menos un cierto grado de industrialización, en el cual, particularmente en las economías en desarrollo como la nuestra, la pequeña industria desempeña un papel de singular importancia.

Esta, como sabemos aporta economías significativas en el empleo de capital, así como, tiene la particularidad de acumular un capital que en otro caso no existiría o sería destinado a actividades con limitada capacidad de generar empleo y valor agregado nacional.

El sector promueve el ahorro interno y lo transforma en inversión productiva, que tiene su origen en un disciplinado sistema de ahorro familiar y doméstico.

Este dinero invertido productivamente genera impuestos, ingresa al sistema monetario, se transmite creando riqueza a través de la producción y el trabajo, creando importantes efectos multiplicadores y fortificando la economía nacional, con su importante aporte al Producto Nacional Bruto.

Así, podemos concluir, que el sector de la Pequeña Industria, impulsa y coadyuva al desarrollo de la economía y el crecimiento industrial de las fuerzas productivas del país, porque luchando por este resultado posibilita:

a. El desarrollo de tecnologías apropiadas;
b. Canaliza el ahorro interno en la producción nacional;
c. Genera miles de puestos de trabajo con menor inversión para cada uno de éstos;
d. Despolariza la actividad industrial, produciendo un impulso y mejoramiento de las condiciones de vida del sector geográfico donde esta actividad emerge;
e. Utiliza materias primas nacionales;
f. Satisface las necesidades primarias del consumidor nacional;
g. Se presenta como un potencial exportador de nuestros productos manufacturados para darle más poder de competencia a la producción nacional; y,
h. Coadyuva a la mejor distribución de la riqueza.

Así, concomitantemente con esto, en los últimos años, FENAPI y las Cámaras Provinciales han impulsado decididamente el fortalecimiento de la organización gremial de la Pequeña Industria; para ello se han formado nuevas Cámaras, se han creado Núcleos Cantonales y directorios provinciales, lográndose una mayor participación de los empresarios en su organización gremial.

La Federación, con el apoyo de algunas entidades nacionales y organismos internacionales, está fortaleciendo su estructura administrativa y técnica; realizando programas de capacitación de dirigentes y seminarios de liderazgo y tiene planes de corto y mediano plazo en capacitación, promoción y mejoramiento de su desarrollo institucional.

FENAPI está conformada por 19 Cámaras Provinciales y 9 Núcleos Cantonales que agrupan aproximadamente a 8.000 pequeños industriales; y a su organización y consolidación contribuímos con todas nuestras posibilidades en beneficio de la pequeña industria y el progreso del país.

ACTIVIDADES DE LA FEDERACION

El Presidente de FENAPI, Ing. César Frixone Franco, fue invitado a participar en la Reunión Regional Latinoamericana sobre Fomento de la Pequeña Empresa que organizó el Banco Mundial en Quito, en coordinación con la Corporación Financiera Nacional, y que se llevó a cabo del 23 al 26 de abril del presente año en el Hotel Colón Internacional.

Allí se dieron varias reuniones y debates sobre aspectos muy importantes, relativos a la pequeña empresa en los que se discutieron aquellos elementos tan vitales y del momento, que tienen que ver con las actividades del sector. Sin embargo, es de lamentarse que la Federación no fue invitada a participar con sus ponencias, lo cual habría sido interesante, en la medida en que precisamente es el gremio el que ha realizado pronunciamientos importantes que a no dudarlo, son de preocupación nacional, ya que los problemas de la Pequeña Industria, son los problemas del país y debe dárseles atención inmediata y efectiva por el bien del amplísimo sector económico-social que representa.

****

Se llevó a cabo un importante Foro-Almuerzo organizado por FENAPI para los medios de comunicación, el día 16 de abril de 1985, en el Hotel Colón Internacional, al cual asistieron los directores y representantes de los principales medios de prensa escrita y hablada. En este evento, la Federación presentó el documento: "Importancia Socio-Económica de la Pequeña Industria", en el mismo se hacen importantes consideraciones sobre el sector, pues es indudable que en los últimos años se ha producido un cambio notable en el proceso de industrialización del país.

No se puede dejar de considerar el hecho de que el sector pequeño industrial se presenta con una importancia alternativa para la economía del país, ya que éste coadyuva al desarrollo y promueve la dinámica interna de nuestra estructura; puesto que es una escuela de capacitación de recursos humanos no calificados, orienta el ahorro interno hacia la producción, eleva la productividad, acelera el crecimiento industrial, es generadora de empleo, y distribuye el ingreso nacional.

SE COMPLETO EL DIRECTORIO DE FENAPI

En la sesión del Consejo Nacional de FENAPI, realizado el 16 de abril del año en curso, se decidió completar el Directorio de la Federación, pues el mismo estuvo incompleto por renuncia de dos de sus miembros.

La elección de los nuevos directores recayó en las personas del doctor Oswaldo Domínguez, como Vicepresidente (el cual venía actuando como Vicepresidente Encargado), y en la señora Marieta Espinosa como Prosecretaria.

La capacidad, entusiasmo y conocimiento que tienen de la Pequeña Industria, así como su reconocido prestigio como empresarios, califican suficientemente a estos flamantes miembros del Directorio. Confiamos en que sabrán brindar todo el aporte necesario y el impulso requerido a las actividades de la Federación y del gremio.

El Presidente de FENAPI, Ing. César Frixone, fue invitado a una reunión de camaradería en la casa del Sr. Udo Derichs, Representante de la Fundación Konrad Adenauer, en la misma que se homenajeó a tres importantes parlamentarios alemanes que se encuentran visitando nuestro país. Asistieron además, representantes del Banco Central, Banco Nacional de Fomento, FECOAC, INSOTEC, Cámara de Pequeños Industriales de Pichincha y otros invitados.

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Entre las varias entrevistas hechas por los medios de comunicación social del país, al Presidente de la Federación, y a través de las cuales se puede proyectar a la ciudadanía la problemática del gremio; en estos últimos días, lo ha tenido con representántes de importantes diarios del país, canales de televisión y radiodifusoras, así como también de dos muy conocidas revistas de circulación internacional.

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El Presidente de FENAPI, Ing. César Frixone Franco, ha sido invitado a participar en la Conferencia Taller Internacional sobre Apoyo a la Pequeña y Mediana Empresa, la misma que se llevará a efecto en Alajuela, Costa Rica, entre los días 1 y 6 de julio del presente año. Para este importante evento se ha estructurado un documento sobre las Corporaciones de Garantía Crediticia, por ser ésta una provechosa alternativa para la pequeña industria y que podría también aplicarse en muchos otros países. Esta Conferencia es auspiciada por la Fundación Interamericana y organizada por el Programa de Pequeña y Mediana Empresa del INCAE.

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El Secretario Ejecutivo de FENAPI, Econ. Aníbal Rovayo, se encuentra asistiendo en representación del Presidente de la Federación, a las reuniones convocadas por el Director General de Integración del MICEI, en las que se analiza la factibilidad de la creación de la Bolsa Nacional de Subcontratación como parte del Programa de Subcontratación Regional auspiciado por la Junta del Acuerdo de Cartagena. La Subcontratación en la industria puede favorecer a la complementación industrial (relaciones horizontales), así como también a la especialización (relación vertical), involucrando a las industrias grandes, medianas y pequeñas, propendiendo de esta manera a la integración del sector manufacturero. Sería conveniente entonces, racionalizar debida y coherentemente su estructuración, a fin de que sus posibles beneficios sean compartidos en la forma más adecuada.

****

La Federación, conjuntamente con la Cámara de Pequeños Industriales de Imbabura, se encuentra realizando las últimas gestiones dentro de la preparación de la IV Convención Nacional Extraordinaria de Pequeños Industriales del Ecuador, la misma que se efectuará en Ibarra, los días 23 - 24 y 25 de mayo. A este importante Evento cuya trascendencia es vital para la vida institucional de FENAPI, han sido invitadas autoridades nacionales, seccionales y de organismos relacionados con el gremio. Además, cabe recalcar que han ratificado su asistencia las delegaciones de todas las Cámaras Provinciales y Núcleos Cantonales, afiliados a FENAPI. Para la Convención se ha previsto una agenda que complementará los aspectos inherentes a su convocatoria, con jornadas de esparcimiento y confraternidad entre la familia pequeña industrial ecuatoriana y sus invitados.

NOTICIAS DEL GREMIO

En el Núcleo Cantonal de Santo Domingo de los Colorados, a través de su Presidente, señor Teodoro Jarrín, se están realizando gestiones para conseguir del I. Municipio de esa ciudad, un terreno como donación, el mismo que será destinado a la construcción de la sede del Núcleo de Pequeños Industriales de esa importante capital cantonal.

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En la ciudad de Quevedo, el Núcleo de esa localidad, mediante la acción mancomunada de sus directivos, ha realizado una Promesa de Compra-Venta de un terreno, en el que posteriormente se procederá a construir la sede de los Pequeños Industriales de ese Cantón. Desde la Federación, reciban nuestra cordial felicitación por ese primer logro alcanzado para esos fines y desde ya les auguramos éxitos en las siguientes ges-

tiones y tareas que se han propuesto. ¡Sigamos adelante!

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En la Cámara de Pequeños Industriales de Manabí, el Vicepresidente, señor Vicente Cedeño, encargado de la Presidencia, mantiene desde sus nuevas funciones, una estrecha relación con esta Federación, de lo cual nos congratulamos, ya que ésa es la mejor manera de fortalecer al gremio, a través de los vínculos directos con el organismo que lo representa. Merece mención especial el trabajo que desarrolla su Presidente, para obtener una reorganización interna que le permita mayor efectividad para las tareas y objetivos que esa Cámara se ha planteado.

Cabe destacar el trabajo que desarrolla el Núcleo Cantonal de Manta, presidido por el señor Ing. Washington Zavala, en su afán por conseguir un mejoramiento de su estructura y organización para dar un mejor y eficiente servicio a sus afiliados. Se han efectuado cursos y seminarios, especialmente de crédito.

Hay que indicar también, que han participado en el Seminario de Liderazgo, el "Arte del Cabildeo", organizado por la Federación, los señores: Ing. Washington Zavala, Víctor Villacís y José Guillén, miembros de esa Cámara.

Luego de varias reuniones que FENAPI ha tenido con funcionarios del MICEI, a quienes se había encargado la coordinación de los planteamientos sobre reformas arancelarias, así como también con el Econ. Xavier Neira M., Ministro de Industrias, Comercio e Integración, se ha podido conseguir que más de quinientas partidas arancelarias, sigan siendo consideradas como de prohibida importación, propendiéndose de esta manera a brindar cierta protección a los productores nacionales y dentro de ellos a los pequeños industriales ecuatorianos, cuyas actividades generan un alto valor agregado y consecuentemente requieren de incentivos y protección efectiva, de parte de los organismos del Estado que tienen a su cargo la ejecución de las políticas industrial y de comercio exterior del país.

****

Se expidió por parte de la Superintendencia de Bancos, el Reglamento de las Corporaciones de Garantía y Retrogarantía Crediticia, el mismo que fue publicado en el Registro Oficial No. 162 del 13 de abril del presente año. Este instrumento, normará y regulará el funcionamiento de las Corporaciones antes citadas, posibilitando además, la democratización del crédito, orientado a la pequeña industria y artesanía. Cabe recalcar que éste ha sido un importante logro conseguido en base al constante trabajo de casi cuatro años, mantenido por la Federación, contando con el apoyo de Expertos de la Fundación Konrad Adenauer de la República Federal de Alemania y la participación de técnicos nacionales.

****

El Ing. Gerardo Arévalo Hidrobo, miembro de la Cámara de Pequeños Industriales del Azuay, ha sido designado por FENAPI para que asista como su representante y en calidad de Consejero Técnico de la delegación ecuatoriana, a la 71ava Reunión de la Conferencia Internacional del Trabajo a realizarse en Ginebra - Suiza, del 7 al 27 de junio del presente año, en la que se discutirán y analizarán importantes aspectos de interés gremial y nacional.

****

Se constituyó en Gualaquiza el Núcleo de Pequeños Industriales de ese importante Cantón oriental. Consideramos de vital importancia este hecho, que a no dudarlo es de gran significación para la provincia de Morona Santiago y el gremio, ya que este es el paso inicial con el que se posibilitará la motivación necesaria, a fin de poder organizar la Cámara Provincial.

La Federación, con sus directivos nacionales, estuvo presente en el acto de posesión de la Primera Directiva del Núcleo, contando con la presencia de las principales autoridades del Cantón.

La presidencia del Núcleo, la ejerce el señor Alfonso Herrera, quien con el apoyo decidido de los socios, está dispuesto a colaborar íntegramente y trabajar por los nobles intereses del gremio. Nuestra más sincera felicitación a estos esforzados pequeños industriales que han dado un ejemplo de valentía al responder con éxito al reto que se habían propuesto. Obviamente, siempre tendrán el apoyo de la Federación y pueden estar seguros de que estas acciones conjuntas, son las que nos fortalecen y animan para trabajar más en pro de los intereses del gremio.

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Se efectuó una reunión en la Embajada de la República de Chile, con la finalidad de reactivar las acciones binacionales de la Cámara de Comercio Ecuatoriano - Chilena, teniendo como propósito el de intensificar las relaciones comerciales, impulsar el intercambio entre los dos países hermanos.

Se constituyó el Directorio Provisional que está presidido por el Ing. César Frixone Franco, ex-Cónsul Honorario del Ecuador en Antofagasta y actual Presidente de FENAPI, así como de otros connotados ciudadanos ecuatorianos y chilenos que tienen el firme propósito de revitalizar los históricos lazos entre ambos pueblos.

****

El Presidente Constitucional de la República del Ecuador, Ing. León Febres Cordero, suscribió en Washington, el Convenio Constitutivo de la Corporación Interamericana de Inversiones, la cual brindará un gran aporte económico, tecnológico y de asesoría a la pequeña y mediana empresa.

Es aspiración del Sector, que la firma de este Convenio rinda los mejores frutos en beneficio de los empresarios ecuatorianos.

****

Se renovó la Directiva del Sector Metal-Mecánico de la Cámara de Pequeños Industriales de Pichincha, quedando ésta estructurada de la siguiente manera:

Presidente:	Econ. Humberto Sánchez
Vicepresidente:	Sr. Mario Picerno
Secretario:	Sr. Fernando Mecías
Tesorero:	Sr. Julio Ron

A su vez se posesionó también la nueva directiva del Sector Maderero de la Cámara de Pequeños Industriales de Pichincha, la que está compuesta por las siguientes personas:

Presidente:	Arq. Marco Suárez
Vicepresidente:	Lcdo. Jorge Díaz
Secretario:	Arq. Bolívar Sánchez
Tesorero:	Ing. Vicente Ríos.

A estos directores, les deseamos éxitos en los objetivos propuestos.

Un importante Seminario sobre el tema: "Parque Industrial, un Mecanismo del Desarrollo", se realizó en la ciudad de Cuenca, el 16 y 17 de mayo de este año.

El Evento lo organizó el Parque Industrial de Cuenca, con el auspicio del Centro de Desarrollo Industrial del Ecuador, CENDES. En el Seminario participaron importantes instituciones del país como son: El Centro de Reconversión Económica del Azuay, Cañar y Morona Santiago; la Asociación Ecuatoriana de Parques Industriales (ASEPI); fue invitada también la Federación Nacional de Cámaras de Pequeños Industriales del Ecuador, FENAPI, en la persona de su presidente, Ing. César Frixone Franco.

En el evento se dictaron interesantes conferencias, a cargo de las entidades participantes. Cabe destacar, que la actuación del Ing. César Frixone fue muy aplaudida ya que hizo una reflexión bastante objetiva, la que fue acogida por los organismos presentes y que tienen que ver con los Parques Industriales y con la Pequeña Industria. Mencionó además una síntesis concreta de la real situación de los parques industriales del Ecuador, de los cuales tenemos como excepción los del Azuay y Chimborazo, ya que los restantes "no funcionan", pues se han quedado en la etapa de preparación.

Concluyó su intervención, pasando revista de algunos aspectos actuales de la economía del país, cuyos efectos han impactado en el sector Pequeña Industria.

"Colegas pequeños industriales: La unidad y la coherencia en la defensa de nuestros intereses y la búsqueda de nuestros objetivos, nos permitirá obtener los mejores resultados para el gremio, con los que indudablemente contribuimos a tener una industria nacional fuerte que a no dudarlo, es la alternativa para el progreso socio-económico del país.

Por ello, impulsa tu Cámara y tu Federación, con tu activa participación".

ACTIVIDADES DE ASISTENCIA TECNICA AID-CA / FENAPI

Este es el primero de una serie de artículos que el Lcdo. Bolívar León Salvador, Asesor de Capacitación del Proyecto AID-CA / FENAPI, escribe para el Boletín de FENAPI, sobre temas de Capacitación y Asistencia Técnica, que la Federación considera de importancia fundamental para el desarrollo y consolidación gremial de FENAPI, sus Cámaras Provinciales y Núcleos Cantonales.

LA CAPACITACION

La adquisición de conocimientos es el más importante beneficio personal de un ser humano. La capacitación incrementa el conocimiento del hombre en cuestiones específicas. Es una de las pocas cosas que no pueden comprarse y ningún beneficio supera al que produce el conocimiento. El tiempo y esfuerzo destinados a la capacitación de adultos, constituye la inversión de más alta rentabilidad.

Capacitar, es un verbo trasitivo que implica, necesariamente comunicación, información ordenada, transmisión metódica de algún conocimiento, fundamentalmente dentro del campo teórico, de modo que, al llegar éste hacia determinado sector de necesidad, produzca un aprendizaje consciente y permanente en el ser racional en capacidad normal de adquirir este conocimiento, que transforme su comportamiento en el área recibida y refleje, a su vez, un cambio en su comportamiento general. Desde este punto de vista, la capacitación puede ser general y especial; y asimismo, el conocimiento impartido será, a su vez, general y específico.

¿Cuáles y cuántas son las razones para impartir capacitación? Muchas y muy importantes; que van desde el aumento del conocimiento, simplemente, hasta la mayor obtención de utilidades.

Toda persona requiere capacitarse y más aún, cuando su actividad tiende a desarrollarse en determinado campo específico. Pero la capacitación no debe ser, sencillamente, un resultado del "snobismo" o de la "obligación", sino la respuesta racional a necesidades racionales, mediante una planificación que permita mantener su actualización, mejoramientoy ratificación o verificación de su actividad actual.

Podemos decir que la capacitación debe hacerse en tres partes: Planificación, Ejecución y Evaluación. La Planificación, consiste en decidir, qué es lo que se va a enseñar. Pero no es una decisión personal o caprichosa, sino la respuesta a una necesidad del receptor y requerirá ajustes según sea conveniente, de modo que, si bien podemos planear dentro de lo "óptimo", en ciertos casos, tendremos que llegar solamente a lo "satisfactorio", pero en ambos casos, debemos tener presente la posibilidad de la "adaptación", y ésta dependerá mucho del elemento receptor (capacitado).

Es importante, para que resulte eficiente la capacitación, tener en cuenta las personas que la van a recibir, ya que, pueden tener diferente capacidad de aprendizaje. Esto es lo que se denomina "diferencias individuales". En cualquier aula, en el desarrollo de cualquier curso de educación e instrucción formal; y más aún, en la capacitación técnica, se hace necesario satisfacer las necesidades dentro de estas diferencias. Puesto que, si recordamos nuestras propias épocas de aprendizaje, veremos cómo habíamos de distintas capacidades, no sólo en la percepción sino en el interés de aprender determinada disciplina; y el profesor, debía dirigir su instrucción a un nivel promedio; así, quienes estaban mejor dotados avanzaban, "comprendían", con mayor rapidez y llegaban a aburrirse; y aquellos que no tenían esta aptitud, tenían dificultades, requerían más tiempo para comprender, a veces, se confundían. Este agrupamiento de personas con diferentes capacidades se llama "agrupamiento heterogéneo". Cuando nos encontramos con un grupo humano de capacidad similar le denominamos "agrupamiento homogéneo".

Lo verdaderamente importante para el capacitador o instructor, es reconocer que existen estas diferencias de capacidad y se debe tener presente la posibilidad de que las personas receptoras de la capacitación pueden no entender el material presentado; que no todos entenderán al mismo tiempo, que no todos lograrán tener el concepto en toda su profundidad; y se debe pensar, en que nadie desea hacerse dificultades al aprender, pero que sí puede tenerlas. Por ello, el capacitador o instructor, debe estar consciente de estas diferencias y ser comprensivo cuando trabaje con estas personas y en base a este factor deberá planificar la capacitación.

La ejecución es la presentación misma del material preparado para la capacitación. Se debe explicar al estudiante por qué forma parte de este curso.

Es importante repetir los aspectos básicos del programa, hay que referirse al tema de cada unidad y el tipo de cuestionarios y exámenes de éstas.

Siempre que se inicia una nueva sesión realizaremos un breve repaso de la anterior, ratificando los conceptos más importantes de la sesión pasada y luego procederemos a enlazarlos con los nuevos y al final, realizaremos un resumen de lo tratado ratificando a través de preguntas lo estudiado para comprobar el grado de asimilación.

La evaluación es un juicio general respecto de la eficiencia del contenido del programa desarrollado, que conlleva, el análisis de conceptos y la relación de éstos en los casos prácticos, ya que, de muy poco sirve el concepto sin una inmediata aplicación que incentive al alumno a ir cada vez más allá en su aprendizaje.

La importancia del proceso, el acierto con que llevemos adelante estas "porciones" de acción, redundandará en el mayor o menor interés del aprendiz y asimismo será su respuesta.

No se trata de un lucimiento personal, se trata de ser claros, precisos y metódicos de modo que nuestro mensaje llegue con la eficacia que buscamos y que ellos necesitan.

Organo Oficial de la Federación Nacional de Cámaras de Pequeños Industriales del Ecuador.

Ing. Cesar Frixone Franco, Presidente.
Dr. Oswaldo Domínguez, Vicepresidente.
Sr. Carlos Luzuriaga, Secretario.
Sra. Marieta Espinoza, Prosecretaria.
Sr. Angel Loaiza Rosillo, Tesorero.
Econ. Aníbal Rovayo L., Secretario Ejecutivo.

ASESORIA TECNICA: CREATIVE ASSOCIATES INC

IMPRESOS

A P P E N D I X E

RESUMEN DEL VIAJE DE VISITA A VARIAS CAMARAS PROVINCIALES Y NUCLEOS CANTONALES

Cumpliendo parte de las labores previstas a desarrollarse en esta etapa del proyecto para FENAPI, donde se establecen visitas a las Cámaras Provinciales y Núcleos Cantonales, a fin de conocer de cerca al gremio en cada agrupación provincial y local; y con el fin de tener contacto directo con los afiliados y auscultar sus opiniones, inquietudes, necesidades concretas y sus áreas específicas y las aspiraciones que sienten, acompañé a una delegación de FENAPI, compuesta por el Ing. César Frixone, Presidente; Sr. Angel Loaíza, Tesorero, y Econ. Aníbal Rovayo, Secretario Ejecutivo. Además estuvo en la comitiva el Señor Gino Lofredo, Coordinador del equipo de trabajo de AID-Misión Quito, encargado de realizar un estudio diagnóstico de las condiciones actuales de la Pequeña Industria y detectar en base a ello, las posibilidades, alternativas, mediante las cuales la Agencia Internacional de Desarrollo de los Estados Unidos de Norteamerica, estaría dispuesta a prestar su ayuda y asistencia técnica al sector de la pequeña industria del país, con el fondo económico que lo ha determinado para el efecto.

La mecánica de trabajo que se empleó, fue la siguiente:

1.- Presentación de la comitiva visitante por el Presidente de cada Cámara o Núcleo.

2.- Saludo y presentación por el Presidente de FENAPI.

3.- Presentaciones mutuas: a) De la comitiva
b) De todos los asistentes

La comitiva se presentó así:

- Nombre
- Función
- A quien sirve o para quien trabaja
- Que vinculación ó qué tareas cumple para la Federación y el gremio.
- Cuál es el propósito de su visita.

Los miembros de las Cámaras de presentaron así:

- Nombre
- Qué clase de empresa tiene
- Qué produce y dónde comercializa, sus productos
- Cuántos trabajadores y empleados tiene
- Cuántos años tiene en la Pequeña Industria
- Cuáles son sus principales problemas
- Qué espera de la Cámara y la Federación

Así puedo señalar, que visitamos las siguientes Cámaras y Núcleos Cantonales:

1.- Núcleo de Danto Domingo de los Colorados, donde nos reunimos con 15 miembros de la Cámara, de los que 5 personas eran representantes de los sectores más importantes: Maderero, Confecciones, Agroindustrial, Alimenticio y Metal-mecánico. En total, el Núcleo tiene 72 socios.

PROBLEMAS DETECTADOS: Obtención de créditos y financiamiento, Asistencia Técnica para sus empresas y de motivación gremial.

En la localidad existe un Parque Industrial Maderero y una Asociación Industrial Maderera que tiene 11 años de vida. Trabaja paralelamente al Núcleo de Pequeños Industriales. No colabora efectivamente.

Se entregó el Boletín Informativo de FENAPI y otros materiales.

2.- Núcleo de Quevedo, reunión con 12 miembros de la Cámara, en total son 100 socios.

Asistieron representantes de los sectores: Alimenticio, Maderero, Bloques y Hormigón, Muebles de Madera, Metal-mecánico.

PROBLEMAS DETECTADOS: Sistema y obtención de créditos, cuál es la forma de utilizarlos y cómo hacer la solicitud y presentarla al Banco Nacional de Fomento; a pesar de haber 6 bancos privados, no tienen acceso al financiamiento.

Problema legal y laboral. Desconocen leyes laborales, cómo usarlas y no tener problemas de juicios con los operarios o con el Estado, por incumplimiento.

Insisten en reafirmar la "ideología del gremio" ó la filosofía que la orientan y motivarse para cohesionar su Cámara y la Federación.

No reciben asistencia técnica de parte del Estado. La quieren recibir a través de FENAPI, quien se encargaría de todo el proceso de preparación.

Se entregó el Boletín Informativo de FENAPI y otros materiales.

3.- Cámara de Babahoyo, reunión con 12 miembros de la Cámara en total son 180 socios.

Estuvo presente el Gerente General de la Sucursal del Banco Nacional de Fomento, Señor César Guerrero Bajaña, asistieron represenantes del sector agrícola industrial, gráfico, Metal-mecánico, Maderero y Confecciones.

PROBLEMAS DETECTADOS: Solicitan asistencia técnica para sus empresas y para los dirigentes No conocen técnicas parlamentarias ni cabildeo; no existe suficiente actividad de los socios, internamente en su Cámara, a pesar de que están bien organizados; tienen buenos dirigentes en especial el Presidente Sr. Julio - Ramírez.

Es una de las pocas Cámaras bien atendidas por el Banco Nacional de Fomento, que sí les confiere créditos.

INFORMACIONES:

Del Gerente General del Banco de Fomento:

- Indica que en el CONADE - Consejo Nacional de Desarrollo - adscrito a la Vicepresidencia de la República, tienen 13 nuevos proyectos integrales de desarrolllo agro-industrial, listos para que el B.N.F. los financie.

- Están completos los estudios de un Parque Industrial para Babahoyo, faltaría solamente ubicar los terrenos a los usuarios y que la Municipalidad provea los servicios básicos: luz, agua potable, telecomunicaciones etc., que está empeñados en que inicie a operar dentro de este año.

Existen solo 3 bancos privados.

4.- Cámara de Loja, reunión con el Presidente de la Cámara Ing. Edgar Maldonado Larreátegui y dos miembros.

No hubo sesión por no estar preparada la reunión y no asistieron los socios.

Solo se reunieron el Presidente, Tesorero y Secretario Ejecutivo de FENAPI.

No estuvieron presentes, Gino Lofredo y Blacio Bermeo, por tratar únicamente asuntos gremiales y muy particulares de la Cámara.

Sólo dejamos el Boletín Informativo de FENAPI y otros materiales.

5.- NUCLEO DE YANZATZA.- Reunión con 20 miembros del núcleo, en total son 40 socios. - También asistieron 10 afiliados de la Cámara de Zamora. Asisten los representantes del sector maderas y de aserrío, carpintería y muebles, metalmecánico, alimenticio.

PROBLEMAS DETECTADOS: Ausencia total de crédito, piden que se tramite la instalación - de una sucursal del Banco Nacional de Fomento. Solicitan Asesoría de cómo hacer la solicitud de crédito.

Se observa escasa formación de los dirigentes pero un gran deseo de trabajar.

Se entregó el boletín informativo de FENAPI y otros materiales.

6.- NUCELO DE GUALAOUIZA.- Reunión con 25 miembros, asistieron también el Jefe Político del Cantón y el Presidente de Zamora En esta sesión Solemne se posesionó a la Directiva oficial de la Cámara y se entregó una placa de reconocimiento a la labor desarrollada. La placa entregó FENAPI.

PROBLEMAS DETECTADOS: Los pequeños industriales piden que el Banco Nacional de Fomento envíe un funcionario para que - les explique cómo usar las líneas de crédito del Banco; así también solicitan información de la Ley de Fomento - a la Pequeña Industria y sus beneficios. Como es un núcleo en formación, no tienen aún la suficiente organización interna, pero ya lo han empezado a hacer.

Se entregó el boletín informativo de FENAPI y otros materiales.

Se sugirió que la Cooperativa de Ahorro y Crédito para pequeños industriales se forme en la localidad.

7.- CAMARA DE AZOGUEZ.- Sesión Ampliada de la Cámara y - homenaje a un pequeño industrial; tienen 200 miembros y asistieron 150 personas aproximadamente. Se realizó en el Salón de

la Provincia, del Local de la Prefectura Provincial de de Azoguez.

Asistieron.- Prefecto del Azuay,
Representate de la Cámara de Comercio - Azuay.
Delegados del Ministro de Industrias y - Comercio.
Gerente Regional del Banco de Fomento.

Se entregó una mención de honor de la Provincia al Sr. Rodrigo Mendieta, gestor de la Pequeña industria del - Cañar y fundador de la Cámara hace más de 10 años. - Fue reconocido por el Gobierno Nacional, en 1984, como uno de los 15 mejores industriales del país.

Fenapi también entregó una placa de reconocimiento a - labor industrial y gremial cumplida por el Señor Mendieta.

Esta Cámara está bien organizada, tiene un cuerpo directivo que labora activamente y su presidente, el Dr. Oswaldo Domínguez R. ha cumplido una dirigencia adecuada y firme para mantenerla bien.

Han obtenido ayuda crediticia por parte del Banco Nacional de Fomento, y se sienten bien atendidos en cuanto a crédito.

Sinembargo solicítan maś ayuda para la formación de dirigentes y la realización de eventos, por cuenta propia.

Es una cámara que tiene suficiente fuerza y que sí colabora con la Federación.

Se entregó el boletín informetivo de FENAPI y otros materiales.

9.- Cámara de Cuenca: Se hizo la reunión con 20 miembros. Estuvieron como asistentes, también los señores:

Rómulo Ochoa, Presidente de la Cámara del Azuay
Ing. Udo Derichs - Representante de la Fundación Konrad Adenauer
Econ. Janeth Palacios - Gerente de la Corporación de - Garantía Crediticia
Ing. Gino Lofredo - Consultor de A.I.D.
Econ. Aníbal Rovayo - Secretario Ejecutivo de FENAPI
Econ. Blacio Bermeo - Coordinador del Proyecto AID-CA/ FENAPI.

Debo indicar que nosotros habíamos anunciado nuestra - llegada a esa Cámara y nos habían confirmado que nos - esperaban, pero no conocíamos que iba el equipo de - INSOTEC para hablar y promocionar su Corporación de Garantía Crediticia.

Primero se hizo la presentación de las Comitivas por el Presidente de la Cámara (para INSOTEC) y por el Presidente de FENAPI

Luego, intervención del Presidente de la Federación para hacer una explicación de la posición de la Pequeña - Industria respecto a la política económica en general, del Gobierno Nacional y trató al mismo tiempo varios temas específicos como los Aranceles.

Seguidamente, presentó un documento de la Importancia - Socio-Económica de la Pequeña Industria, que fue presentado en el foro con los periodistas, en Quito, en días anteriores.

Luego trataron asuntos netamente gremiales y de la Cámara en el que se dio en foro abierto para discutir sus - asuntos internos.

En general surgieron opiniones de cómo darle más presencia al gremio; cómo tener mejores beneficios y cómo conseguir que el Estado acepte a la pequeña industria en la dimensión e importancia que ésta requiere.

Se observa que es una Cámara muy bien organizada, con local propio (todo un piso de un edificio), tienen su Cooperativa de Ahorro y Crédito, el personal administrativo básico para poder funcionar y los ingresos económicos necesarios para su gestión.

Sin embargo, solicitan, y así lo manifestaron que haya más asistencia en preparación de dirigentes, a las Cámaras y están muy seguros de que tendrán en julio próximo el Seminario de Cabildeo o Motivación ya anteriormente ofrecido por FENAPI.

Nos retiramos unos momentos antes de que iniciara, el INSOTEC, con su explicación y promoción de qué son las Corporaciones de Garantía Crediticia.

Entregamos el Boletín Informativo de FENAPI y otros documentos.

Quito, 25 de abril de 1985

Blacio Bermeo Oliveros
COORDINADOR PROYECTO ASISTENCIA
TECNICA AID-CA/FENAPI

A P P E N D I X F

FENAPI MANAGEMENT TRAINING CURRICULUM

A Three Part Management Training Program Focussed on Practical Techniques for Improving Profitability in the Current Business Environment

INTRODUCTION

The purpose of this three day course is to respond to FENAPI member requests for an integrated approach to three business problems: (1) Market Analysis and Research and (2) Business Planning and Control and (3) Business Financing. All three problems are intimately related. Market analysis and research is usually considered the most difficult to prepare because it is time consuming and frequently costly; but it is the basis for sales projections and consequently, financing requirements and, therefore, must be done with as much accuracy as possible. Without business planning and control, the business lacks criteria for organizing, scheduling annd managing its activities to achieve its market and profit goals. And without a clear picture of financing requirements and methods, the research, and planning and control are useless.

The intent of each segment of the course is to indicate why and how it is done. This is accomplished procedurally in a step-by-step outline on how to do each of the three segments followed by a case study of a typical ecuadorian company which illustrates the practical steps previously outlined.

Time will be available to discuss in detail the procedural steps in each segment and the case study.

(At this point we suggest that the person making this presentation, outline a typical ecuadorian business which is trying to decide whether or not

it should expand production or introduce a new product by reviewing what it has done <u>and</u> <u>not</u> done in terms of market research and analysis, business planning and control, and business financing as they relate to production expansion or a new product.)

(The purpose is to generate audience interest in a practical situation that they are all familiar with (i.e.) their own business)).

~~PART~~ 1: MARKET RESEARCH AND ANALYSIS

Sizing Up Opportunities for Profitable Business

<u>Purpose</u> of Market Research and Analysis:

to ensure that the businessman produces only those products/services and serves only those markets with enough profit potential to warrant the investment.

<u>Situations</u>, in which Market Research and Analysis are appropriate

- when looking at an opportunity for selling existing products to new customers
- when looking at an opportunity to develop and market new products
- when looking at significant changes in the existing product/service line

<u>Why</u> do market research and analysis?

- It is an opportunity to think through all facets of a new product/service without the actual expense of trail and error operation. (e.g. research showed that the major market for a biomedical product was in nursing homes not in hospital emergency rooms as had been previously supposed.)
- It is an opportunity to test the motivation, commitment, and technical expertise of new/existing members of the business team who will implement the activity.
- The data, when compiled and put together in the form of a marketing plan, can be used to assist in securing outside financing for the product/service by giving the financing source confidence that the necessary work has been done.

- The marketing plan will also serve as a guide to management to make sure implementation is going as planned and to indicate where corrections are necessary.

<u>How/where</u> To Get Market Research Information

- Independent Specialists - Trade association research departments, financial institutions, major consulting firms, lobbyists, law firms;
- Governmental Agencies - Commerce, regulatory, financial
- Material Suppliers (Ask how much they sell, to whom, and when);
- Competitors outside the market area (an excellent source if they can be convinced that you are not a threat);
- Competitors in the market area (it is surprising how much information they can give - also misinformation);
- Retired former employees of competing firms now in other business;
- Key person in an existing competing firm - Try to hire them away;
- Existing end users - Source for other users, potential users, suppliers, likes and dislikes about existing product/service;
- Source of Purchase commitments, product/service testing;
- Potential End Users - Source of purchase commitments, product/service testing;

CASE STUDY

Using the previously outlined market research and analysis format, present an ecuadorian company which wants to; (A) introduce a new product or service, and/or; (B) begin selling an existing product/service. Be sure that each part of the case study ties back into the format.

<u>The Basic Activities</u> in Market Research and Analysis

- Identifying product/market opportunities that appear attractive;
- Analyzing these opportunities for profit potential;

- Determining whether investment in and pursuit of new opportunity is appropriate to business goals.

- Formulating market strategy for the product/service in its market(s) on the basis of the conclusions reached.

The Steps to be Taken in market Research and Analysis

1. Clearly define the market analysis issue to be resolved —— the question(s) to be answered, the criteria to be used, the decision to be reached, e.g.,

   - what is the business, or profit (return on investment), objective for the new/revised product/service?

   - what are the market "segments", or customer/geography combinations, to be considered (local, regional, national, export);

   - how many units can be sold at what price?

   - what limits on capital investment and payback period will be used?

Market

2. Determine the total size of the market for the product/service being investigated in the market areas being explored (e.g., total annual and unit sales in sucres in Ecuador),

3. Break this market down into its major segments (relatively homogenous groupings of customers organized by location, income, product useage, and other relevant characteristics).

4. Determine trends in the useage and purchase of the product/service for each of the major segments over recent months or years.

5. Interpret these trends in light of past business conditions and develop conclusions for use in product/service market analysis; for instance, surge in demand for competitive domestically produced products during import controls, with implications on these products when import controls are lifted.

6. Project future trends in the market and its individual segments on the basis of such trend analysis.

Customers

7. Identify the customers to be served in the markets being investigated (what types of customers are being looked at as potential buyers?).

8. Determine, why these customers use (or would use) this kind of product/service (what needs does/would the product/service satisfy?).

9. Determine the basis for their decisions to purchase similar (competitive) products/services to meet these needs (what combination of price, quality, service availability, personal selling, brand loyalty, accessability/availability, etc. appeals to these buyers of similar products?).

10. On the basis of this customer analysis, what kinds of customers, or which market segments appear most attractive to target for the marketing of the product/service being investigated?

Competition

11. Identify and characterize the other, similar products/services in the markets being considered; consider such characteristics as price, quality, performances, customer appeal, reputation, reliability.

12. Identify the sources of these competitive products/services.

13. Determine the approximate share that each such competitor holds of the various markets being analyzed, and, if possible, trends in these market shares.

14. Estimate, from this information, what the market strategy of each of these competitors is and has been and what the relative degrees of success of each have been.

Market Potential

15. Determine, from assessment of the various products, competitors, and trends, what the key elements of sucess in this market (these markets) appear to be e.g., lowest price, competitive price with good quality, competitive price with adequate quality and aggressive direct selling, etc.

16. Given the resources, experience, and capabilities of the business, and given the current competition in the markets being analyzed, select the "position" (business product's price, quality, image, performance, etc.) relative to those of other competing products) in the market(s) at which the product/service being considered appears to have the best chance of successful market penetration.

17. Estimate the level of $ sales and our units attainable in this market position, or "riche", by year for at least three years, considering such market factors as:
   - market(s) size and trends
   - customer loyalty to existing products
   - comparative appeal of product/service being planned

Product/Service Investment Feasibility

18. Clarify business' criteria for assessing the feasibility, or likelihood of business success of the product/service investment being considered, e.g., profitability, counter-cyclical diversification, target return on investment, break-even within x years, etc.

19. Estimate calculate the additional production, marketing, and administrative costs that will be associated with the introduction of the product/service in the selected market(s) at the expected levels.

20. By comparing these costs (step 19) with the sales revenues (step 17) in a cash flow projection for at least three years, determine the cash consequences and — with adjustments for non-cash costss and accounting conventions — the profitabiliy of the product/service given the preliminary market strategy selected.

21. Identify and cost out any significant "negative" risks that appear possible in this initiative and decide if their probability and their size and scope effectively jeoperdize the investment opportunity.

22. Determine whether the investment being considered meets the criteria selected.

PART 2: BUSINESS PLANNING AND CONTROL

Successfully Capitalizing on Business Opportunities

Purpose of Business Planning and Control:

to ensure that business resources and activities are organized, scheduled, and managed so as to achieve the business market and profit goals.

The Uses of Business Planning and Control

- For guiding the design/development of a new product/service, the production of this product/service, and its introduction into the selected markets.

- To guide the business activities for any (plan) period so as to effectively capitalize on the opportunities available during that period.

The Major Activities in the Planning and Control Functions

- Forecasting the economic, financial, and market conditions in which the business will operate for a given period.

- Reviewing, and revising as necessary, existing business/market strategies in light of expected conditions, and setting sales goals appropriate to both.

- Establishing operating plans for the marketing, production, and financing activities needed to meet those goals.

- Monitoring activity and progress against these plans and the sales goals, making changes necessary to adapt to external changes or to correct deficiencies as necessary.

The steps to be Taken in Business Planning and Control Planning

1. Review economic, political, and other business related trends and forecast the conditions that are expected to characterize the sales, financial, labor, raw materials, etc. markets during the period being planned.

2. Review business strategy in light of the forecast and revise as necessary (e.g., new emphasis on exports in response to sucre devaluation or improvement in export insurance).

3. Estimate sales revenue and costs for factors of production (labor, materials, capital, facilities) for the strategy to be used.

4. Develop a marketing plan for reaching sales revenue goals, including:

   - target market segments, price schedules, advertising program, sales methods, distribution plan, and other marketing elements.

   - responsibilities for each marketing activity

   - sales objectives for sales force and sales managers

   - budget for sales and marketing expenditures

   - schedule of key events and targets for the marketing program during plan period

5. Develop a production plan for producing the volume of product/service required, including:

- o level and timing of the production required to support the sales goal,
- o design/development work to be completed prior to production, with schedule and budget,
- o retooling and/or capacity expansion to be completed prior to production, with schedule and budget,
- o use of contracts, joint ventures, or other mechanisms for obtaining needed inventory or finished product from affiliated sources,
- o cost-volume projections by period (week, month), with purchasing, inventory control, and work force aspects of the plan detailed and costed,
- o designation of management responsibility for key elements of the plan,
- o specification of the volume, productivity, quality, and (unit) cost targets to be controlled against,

6. Develop a financial plan for the period, including a plan for the financing of the assets needed to meet the sales goals including:

- o a profit and loss projection covering
  - sales levels and cash receipts
  - production costs
  - marketing costs
  - administrative costs
  - other unallocated overhead costs with the assumption upon which the projection is based clearly specified,
- o a cash flow projection to assist management in deciding when cash from sources other than sales is needed to finance operations during the period, with key assumptions clearly specified about such factors as recognition of receivables, payment of vendors, levels of wages, timing of purchases, timing of price changes, and the like,
- o a balance sheet for the close of the period being planned, if necessary to support an application for credit to be needed during the period,
- o a break-even chart, if a new product/service is being planned, to show the level of sales needed to fully cover the costs of the product/service.

Control

1. Assemble the key targets, events, assumptions, and other monitoring points for inclusion in a monitoring schedule to be used by the business' managers.

2. Clarify responsibility for both the monitoring of performance against the plan and the control of business activities to correct for variances observed.

3. Carry out the management control function during plan implementation continuallly comparing planned with actual results and either change activities if the plan is still valid or change the plan if business conditions have substantially changed.

CASE STUDY

Using the previous case study company (from market research analysis) (INSERT B) present a business planning and control case study using steps outlined in the business planning and control planning format.

(INSERT B) or another case study from a different industry.

Dan

~~PART~~ 3: Business ~~Financing~~ - Providing the resources needed to capitalize on Business opportunities.

Purpose of Business Financing:

to acquire the people, equipment, and materials needed to capitalize on business opportunities at minimal cost to the business.

Situations in which Business Financing is Appropriate

- when capitalizing a new business venture and acquiring the initial capital assets of the business,
- when faced with the need to acquire new assets (plant, equipment, inventory) in order to increase production for new market opportunities,
- when cash is needed to find business activity in an off-season or down cycle of a cyclical business.

The Basic Activities in Financing the Business

- o Establishing the return on investment potential of the business, the new market, or the product/service.
- o Determmining the kind of financing that is appropriate to the need.
- o Developing the financing proposal for the prospective source(s).
- o Investing the financing proceeds (cash) so that the investment works for both the business and its financiers (investors, creditors).
- o Continually working to strengthen the capital structure of the business and to reduce its cost of capital.

The Capital Structure of the Business

- o The different kinds of capital in any business (review).
- o The functions appropriate to each.
- o General guidelines for use of the various kinds of financing (capital), e.g., short-term lines of (bank) credit should be drawn only when management is confident the credit can be repaid within a business cycle (e.g., seasonal).
- o Significant variations by industry (if needed).

Financing New Business Opportunities

- o The tie to the business plan (i.e., determination of kind and value of assets to be finished).
- o The role of the different types of capital in new ventures
  - new equity for risk capital
  - long-term debt for tangible capital assets
  - working capital loans to purchase materials, labor, etc.
  - lines of credit for financing accounts receivable
  - trade credit for financing receivables

INSERT D

CASE STUDY

Develop a case study of an ecuadorian company which needs to acquire new assets in order to increase production for new market opportunities or a new product line.

Alternative Approaches to Training in Credit/Capital/Finance Subjects

Alternative 1: The Role of Credit in Small Business Operations

The Subject Areas and Topics to be Covered

1. The Role of Credit in Capitalizing a Business and Financing its Operations

   - o Debt and equity in the capital structure
   - o Various kinds of debt and the functions appropriate to each
   - o The consequences of changing business operations (e.g., growth, exporting) on the financing of business assets.

2. The Small Business and the Ecuadorian Capital Markets

   - o The financial system within which small business operates
   - o The financial institutions providing credit and affecting credit availability locally
   - o The kinds of credit nominally/actually available from each such source

3. Becoming an Attractive Applicant for Credit

   - o What every lender needs to know.
   - o Profile of a desirable credit risk
   - o Organizing and presenting the support necesary for credit approval

   (o Optional: Workshop on credit application, if competent training resources available)

Optional 4. Strengthening Your Business' Balance Sheet

- o Working for safe debt/equity ratios
- o Matching financing maturities with asset lives
- o Forming business capital rather than borrowing money
- o Working to minimize the cost of the capital the business needs
- (o Other topics related to typical ecuadorian problem areas)

Optional 5. Obtaining Credit for Export Sales

- o The kinds of credit used to finance export activities
- o The way that each works for small business (e.g., how trade credit or export insurance is used correctly by a small business)
- o The locally available sources for each such type of export credit
- (o Optional: Workshop on obtaining and using appropriate export financing)

Pre-final
DRAFT

F E N A P I

CURRICULUM DE ENTRENAMIENTO EMPRESARIAL

Un programa de trabajo enfatizando "Casos de Estudio" y "Enseñanza Modulada", enfocando en la ganancia de la economía ecuatoriana a través de la pequeña industria.

INTRODUCCION

Las oportunidades que se le presentan actualmente al hombre de empresa ecuatoriano lo obligan a buscar nuevos puntos de vista y respuestas creativas y metódicas a los problemas.

En particular, el empresario que está persiguiendo objetivos de crecimiento y ganancia a través de nuevos mercados locales o extranjeros o a través de la introducción de nuevos productos o servicios, necesita valerse de modernas y probadas técnicas de análisis de mercado, planificación y control de negocios y financiamiento, si es que pretende evitar problemas tan comunes como demandas deficientes, competencia excesiva, niveles de producción excesivos o inalcanzables, costos de comercialización excesivos o inadecuados métodos de financiamiento de los negocios.

En respuesta a estas necesidades, FENAPI y Creative Associates Inc. han desarrollado un programa de entrenamiento para los empresarios miembros de FENAPI. El entrenamiento ha sido diseñado para prestar útiles y prácticas guías en la selección de productos y mercados para la empresa, el desarrollo y uso de planes de trabajo efectivos, y el financiamiento adecuado de los activos necesarios para un negocio.

El programa de entrenamiento, aunque fué diseñado como un documento único, se presenta en la forma de tres módulos, cubriendo cada uno las siguientes actividades de una empresa:

- Investigación y Análisis de Mercados;
- Planificación y Control de Empresas; y
- Financiamiento de Empresas.

Cada uno de los módulos destaca el propósito y la importancia de estas actividades en el manejo de empresas como así también ilustra las funciones y procesos que son necesarios para su cumplimiento. Además, cada módulo incluye el análisis exhaustivo de un caso que represente la condición típica de una empresa ecuatoriana que deba realizar una investigación de mercados o deba planificar sus actividades o lograr financiamiento de sus activos. En donde se estima conveniente, se presenta información y ayudas adicionales como ser fuentes de información de mercados, fuentes locales de crédito, etc.

Cada uno de los módulos requiere aproximadamente unas seis horas para su presentación y discusión y preferentemente los tres módulos deberán presentarse en dias consecutivos.

El objetivo del Programa de Entrenamiento de FENAPI es que sus participantes entiendan el papel trascendente que la investigación de mercados, la planificación y la efectiva financiación juegan en el desarrollo de las actividades de una empresa. Se pretende que los participantes desarrollen cierta familiaridad con los conceptos y técnicas presentadas y desarrollen al mismo tiempo un criterio para aplicar las nuevas metodologías a sus propias empresas.

DIA I: INVESTIGACION Y ANALISIS DE MERCADOS

Descubrimiento de Oportunidades

Prooósito de la Investigación y Análisis de Mercados:

Asegurar que el empresario produzca solo aquellos bienes y servicios con suficiente demanda y potencial de ganancia que justifiquen su inversión.

Casos en donde la Investigación y Análisis de Mercados es apropiada:

- Cuando se analiza la oportunidad de vender productos existentes a nuevos clientes;
- Cuando se analiza la oportunidad de desarrollar nuevos productos;
- Cuando se analiza la posibilidad de introducir cambios significativos en la línea de productos o servicios ofrecidos actualmente.

Por qué investigar y analizar mercados?

- Permite descubrir varios aspectos importantes de la comercialización de los productos y/o servicios sin la necesidad de incurrir en egresos financieros que se desprenden de errores de apreciación de la situación a enfrentar.

Ejemplo: La investigación de mercados para productos bio-médicos mostró que la demanda de importancia estaba constituida por hogares de ancianos y no por salas de emergencia de hospitales como se había supuesto en primera instancia.

- Es una oportunidad para poner a prueba el interés y la capacidad técnica de las personas encargadas de implementar la actividad.

- Los datos recavados en la investigación, una vez organizados, analizados e incorporados a un plan de comercialización de un bien o servicio, sirve como un immportante documento de apoyo al momento de procurar financiamiento para nuevas actividades. Las fuentes de crédito se sienten mas confiadas en el proyecto y en el profesionalismo de la firma.

- El plan de comercialización de un producto o servicio es de gran utilidad para la dirección de la empresa pues indica si la implementación se va desarrollando tal cual se había planificado o si existen áreas en donde correcciones son necesarias.

Fuentes de Información:

- Especialistas - Cámara de Comercio, Instituciones de Investigación, Instituciones Financieras, Firmas Consultoras, etc.
- Agencias de Gobierno - Agencias Comerciales, Agencias Reguladoras, etc.
- Competencia Indirecta - Esta es una de las mejores fuentes de información si es posible convencerla que el proyecto no presenta un peligro directo.
- Competencia Directa - Gran cantidad de información puede obtenerse de la competencia aunque se debe tener precaución de considerar información falsa que ocasionalmente puede proporcionarse.
- Proveedores de materiales - Es posible obtener información de las cantidades vendidas, quiénes son los principales clientes y cuándo se realizan esas ventas.
- Empleados de la Competencia actualmente retirados.
- Personal estratégico de la competencia - Muchas veces es posible contratarlos para su compañía si se procede con tacto.
- Usuarios de los Productos - Los actuales usarios de los productos son una buena fuente de información en lo que hace identificación de aspectos positivos y negativos de los productos, otros productos utilizados, productos sustitutos, etc.

Las Actividades Básicas de la Investigación de Mercados.

- Identificar oportunidades de explotación de productos o servicios en mercados que se muestran atractivos;
- Analizar el potencial de ganancia de estas oportunidades;
- Determinar si la oportunidad está de acuerdo con los objetivos de la empresa;
- Determinar si la inversion es conveniente;
- Formulación de la estrategia de mercadeo mas apropiada en relación a las conclusiones obtenidas anteriormente.

Pasos a Seguir

1. Definir con precisión el problema a resolver, las preguntas concretas que se pretenden responder con la investigación, los criterios a emplear y el tipo de decisión a tomar.

* Cuales son las normas de aceptación o rechazo que la compañía fija para inversión en el desarrollo y la comercialización de un nuevo producto o servicio. (Ejemplo: tasa de retorno de la inversión, rentabilidad, período de repago, etc.)

* Cuales son los segmentos del mercado o las combinaciones de productos/regiones geográficas que la compañía desea persuadir.

* Qué volúmen de producción puede venderse y a qué precio?

* Qué límites de inversión de capital se han fijado?

Presentación de un Caso

Usando el formato de Investigación y Análisis de Mercado presentado, analizar una firma Ecuatoriana que:

a. desea introducir un nuevo producto o servicio al mercado; o

b. expande la venta de un producto o servicio existente.

Asegurarse que el análisis del caso siga el formato presentado por el instructor.

MERCADOS

* Determinar el tamaño del mercado a ser investigado en relación al producto o servicio a ofrecer y a la cobertura geográfica esperada.

* Dividir al mercado en segmentos que tiene elementos en común como: ingresos similares, igual cultura o costumbres, lugares cercanos de residencia, iguales actitudes o predisposiciones en relación al uso del producto, etc.

* Determinar las tendencias del uso o compra del producto o servicio en cuestión para los últimos meses o años.

* Interpretar las tendencias en relación a condiciones del mercado y la empresa en el pasado. Elaborar conclusiones pertinentes al análisis y la investigación de mercados.

Ejemplo: Analizar la demanda de un producto manufacturado en el Ecuador mientras existieron restricciones de importación y cual sería el impacto sobre la demanda si posibles medidas económicas eliminaran dichas restricciones.

* Proyectar tendencias futuras de la demanda en relación a cada segmento del mercado en base al análisis efectuado anteriormente.

CLIENTES

* Identificar quienes son los clientes dentro del mercado a servir. Qué tipo de características tienen los clientes de nuestros productos.

* Determinar el criterio decisorio que los clientes emplean para comprar el producto o servicio. Qué los lleva a comprar un producto de una marca y no el de la competencia. Qué combinación de las siguientes características el consumidor juzga como mas atractiva: precio, calidad, promoción, envase, disponibilidad, servicio después de la compra, etc.

* En base al análisis que se presentó, que tipo de cliente o qué segmentos del mercado deben ser persuadidos por la empresa para los productos o servicios en cuestión.

COMPETENCIA

* Identificar a la competencia que comercializa productos y/o servicios iguales o similares. Identificar sus características como: política de precios, calidad de los productos o servicios, reputación en el mercado, relación con los clientes, confiabilidad en los plazos de entrega, etc.

* Determinar el tamaño del mercado que la competencia ha captado. Determinar qué segmentos y si es posible, evaluar las tendencias de cambio para cada uno de los segmentos.

* Estimar, en base a este análisis, cual es la estrategia de comercialización de cada competidor y cuales son los aciertos y desaciertos de los mismos.

MERCADO POTENCIAL

* Determinar en base al análisis de la competencia, productos sustitutos, tendencias, etc. los elementos determinantes de éxito en esa mercado. Por ejemplo: bajo precio, calidad de primera, fuerza de venta experimentada y con contactos, servicio después de la ventaja, etc. Qué juzga el consumidor como importante? Qué elementos son imprescindibles para el éxito en un mercaddo y con un tipo de consumidor determinado?

- Tomando en consideración todas las condiciones del mercado, la competencia y los recursos disponibles, se procede a seleccionar la estrategia de posicionamiento del producto o servicio que mas posibilidad de éxito presente. El posicionamiento del producto o servicio surge de la combinación del precio, características, calidad, imagen y distribución del producto.

- Tomando en cuenta el posicionamiento del producto seleccionado en el punto anterior, estimar las ventas (en sucres y en unidades) que es posible concretar para el próximo año y hacer una proyección para los futuros tres años, considerando:
  - el tamaño del mercado y sus tendencias;
  - lealtad del consumidor a las marcas actuales;
  - ventajas o características únicas de los nuevos productos o servicios a ofrecer.

Como Juzgar la Conveniencia de la Inversión

* Estipular con presición cuáles serán los parametros de aceptación o rechazo de la inversión. Por ejemplo: rentabilidad de la inversión, tasa interna de retorno, período de repago, objetivos de diversifación, etc.

* Estimar cuales serán los gastos de producción, comercialización y administración que la nueva inversión causará al momento de introducir el nuevo producto o servicio al mercado, considerando los segmentos a persuadir y los niveles de venta proyectados para esos segmentos.

* Se deberán comparar las ventas esperadas con los gastos adicionales que la inversión requiere. La diferencia nos mostrará, con los ajustes contables correspondientes, las exigencias de "flujo de caja" y la ganancia esperada para la estrategia de comercialización seleccionada.

* Identificar y estimar aquellos riesgos que puedan afectar sensiblemente el desarrollo de la inversión y de los resultados esperados. Determinar si los riesgos son probables y determinar asimismo si son determinantes del posible fracaso de la inversión. Estimar el costo de posibles pérdidas.

* Determinar si la inversión en consideración satisface el criterio de aceptación que se había fijado anteriormente.

Presentación de un Caso

DIA II. PLANIFICACION Y CONTROL DE EMPRESAS.

COMO APROVECHAR OPORTUNIDADES EXITOSAMENTE.

Propósito de la Planificación y Control: asegurar que las actividades y recursos estén organizados y sincronizados de manera tal de poder cumplir con los objetivos de la empresa en términos de ganancias y cobertura de mercados.

Aplicaciones de la Planificación y el Control:

* Servir de guía en las tareas de desarrollo de nuevos productos y/o servicios, producción de estos nuevos productos o servicios y su introducción a mercados estratégicamente seleccionados.

* Servir de guía para las actividades desarrolladas para así poder aprovechar efectivamente oportunidades que se presentan.

Actividades de la Planificación y Control:

* Preveer las condiciones económicas y financieras del mercado y el contexto en el cual operará la empresa.

* Revisar las estrategias de comercialización en vistga a cambios de los escenarios esperados al momento de la formulación de dichas estrategias.

* Supervisar las actividades y el grado de cumplimiento de los planes, efectuando cambios y corrigiendo deficiencias.

Pasos a Seguir en la Planificaciñon y Control de Empresas:

Planificación

1. Revisar tendencias y proyecciones económicas, políticas y otras variables relacionadas al mundo de lo negocios que puedan tener impacto en las ventas, condiciones financieras de la empresa, clientes y proveedores.

2. Revisar las estrategias de comercialización seleccionadas en vista a nuevas condiciones en el mercado si es que estas difieren de las condiciones proyectadas. Ejemplo: poner énfasis a exportaciones a raíz de la devaluación del sucre.

3. Estimar las ventas y los costos de producción (mano de obra, materia prima y gastos generales) para la estrategia a ser empleada.

4. Desarrollar un plan de comercialización que incluya los siguientes puntos:

- segmentos del mercado a persuadir, precios, programas de promoción, sistema de ventas, sistema de distribución y otros elementos de la comercialización de los productos.
- responsables para cada actividad de comercialización.
- metas de ventas para el personal de ventas, tanto como para los vendedores como para los gerentes de ventas.
- presupuesto de ventas y otras actividades de comercialización.
- programa de eventos importantes y fechas de cumplimiento de objetivos de ventas y otras actividades de comercialización.

5. Desarrollar un programa de producción en relación a la demanda prevista para el nuevo producto o servicio que incluya los siguentes puntos:

- nivel de cooperación y sincronización en el tiempo del proceso de producción para apoyar eficientemente el esfuerzo del Departamento de Ventas.
- trabajo de diseño o desarrollo del nuevo producto en forma previa al proceso de producción.
- reequipamiento de la capacidad productiva a realizarse en forma previa al comienzo del proceso productivo.
- uso de terceros u otros recursos para obtener los niveles de inventario apropiados para hacer frente a la demanda.
- proyecciones de volúmenes de producción y costos asociados para el período de planificación. Considerar los aspectos de compra de materias primas, control de inventarios, mano de obra necesaria, etc.

- asignación de responsabilidades directivas de acuerdo a los elementos principales del plan.
- especificar los volúmenes de producción, productividad, niveles de calidad y costos unitarios de producción que serán empleados como patrones de medida para juzgar el desarrollo futuro del plan.

6. Desarrollar un plan financiero para el período que incluya, además de un plan para financiar los activos, los siguientes puntos:

- una proyección de futuras ganancias y/o pérdidas considerando lo siguiente:
  * niveles de ventas e ingresos a caja;
  * costos de producción;
  * costos de comercialización;
  * costos administrativos;
  * gastos generales no directamente asignables.
- una proyección del flujo de caja que permita a la dirección identificar cuando se necesitará recurrir a fuentes externas para financiar temporalmente las operaciones durante un cierto período. Se deberán tener en cuenta las políticas de crédito y pago a terceros, el momento en que se realizan compras a proveedores, los cambios de precios por estación del año, etc.
- un balance y un cuadro de resultados proyectados a la finalización del período para el cual se está realizando la planificación. Estos dos documentos podrán también ser utilizados en ocasión de recurrir a fuentes de crédito para el financiamiento del proyecto.
- un diagrama de punto de equilibrio que indique el volúmen que se necesita vender para cubrir los gastos ocasionados por la venta. (Punto de ganancia nula).

CONTROL

1. Identificar metas, actividades suposiciones sobre el contexto que deben ser controladas. Incluirlas en una agenda de control a ser usada por la dirección de la empresa;

2. Clarificar las responsabilidades de control y toma de decisiones correctivas que disminuyan los desvios entre lo planificado y la realidad observada.

3. Llevar a cabo la tarea de control en forma contínua, permanentemente comparando lo planificado con la realidad y tomando las medidas necesarias, ya sea cambiando las actividades o cambiando el plan si esto es lo mas aconsejable.

ESTUDIO DE UN CASO

El instructor presentará un caso que ilustre la situación de una típica empresa ecuatoriana para la cul se exigirá que los participantes realicen un esquema de planificación siguiendo los puntos presentados en esta sesión. El instructor deberá decidir si la misma empresa utilizada en la sesión de Investigación de Mercados es apropiada para el trabajo de esta sesión.

DIA III. FINANCIAMIENTO DE NEGOCIOS

Como Obtener Recursos para Aprovechar Oportunidades

PROPOSITO:

Adquirir recursos humanos, equipo y materiales para aprovechar oportunidades mínimo costo.

Situaciones en donde el financiamiento es necesario:

- Cuando se necesita activo fijo para iniciar proyectos o incrementar el nivel de producción;
- Cuando se necesita financiar las operaciones en temporadas de escaso movimiento. De especial importancia en negocios de tipo estacional.

Las Actividades de Financiamiento:

1 Determinar el financiamiento mas apropiado a la necesidad.

2 Determinar el monto de la financiación que se persigue.

3 Desarrollar y presentar una propuesta de financiamiento ante las fuentes de crédito apropiadas.

4 Hacer uso apropiado del monto financiado de acuerdo a los criterios de la fuente de financiamiento.

5 Refinanciar la deuda existente para reducir su costo utilizando distintos mercados de capital según varien las condiciones reinantes.

Revision de Algunos Conceptos Financieros Importantes.

* La estructura de capital de una empresa.

* Distintos tipos de capital para financiar activos y actividades de una empresa.

* Los costos de distintos tipos de capital. (Ejemplo: intereses de los distintos tipos de capital, control, etc.)

* Indicadores de la inversión, útiles en la planificación, desarrollo y presentación de una propuesta de financiamiento. (Ejemplo: rentabilidad de la inversión, tasa de retorno, etc.)

A P P E N D I X G

IN-COUNTRY TRAINING COORDINATOR - BOLIVAR LEON

Job Description

A. PLANIFICACION Y COORDINACION DE ACTIVIDADES DE CAPACITACION

1. Planear el horario, lugar y fecha de los seminarios de capacitación.

2. Hacer los arreglos necesarios para la organización de los seminarios con las cámaras y con FENAPI.

3. Identificar las necesidades de capacitación de las cámaras.

4. Identificar a coordinadores y capacitadores locales que estén en condiciones de dictar seminarios.

5. Desarrollar la agenda de trabajo con los capacitadores para la ejecución de los cursos.

6. Coordinar la producción de materiales, invitaciones y programas para los seminarios.

7. Mantener un record de asistencia de participantes a los seminarios.

B. DISEÑO

1. Diseñar y adaptar cursos de acuerdo a las necesidades de las cámaras.

2. Investigar si otras organizaciones ofrecen cursos semejantes que se puedan utilizar en las cámaras.

3. Presentar el diseño de los seminarios a los coordinadores de las cámaras y obtener su aprobación del contenido.

4. Preparar los materiales necesarios para las sesiones de capacitación: manuales, transparencias, programas, etc.

5. Coordinar la reproducción de materiales con el coordinador administrativo del proyecto.

6. Asegurarse que todos los materiales necesarios lleguen a su destino a tiempo y estén completos y organizados.

C. EJECUCION DE LOS SEMINARIOS

1. Trabajar con los coordinadores de las cámaras para asegurarse que los seminarios se lleven a cabo.

2. Capacitar a los nuevos capacitadores de las cámaras cuando sea necesario. Se debe tratar de solicitar la ayuda de los capacitadores que hayan asistido a seminarios anteriores.

3. Asignar los cursos a enseñase en los seminarios a los capacitadores.

4. Utilizar los materiales diseñados en el adiestramiento de nuevos capacitadores.

5. Desarrollar una agenda para cada seminario en las cámaras.

6. Participar como capacitador en los seminarios cuando sea oportuno y necesario.

7. Reclutar a capacitadores y fomentar su participación en los seminarios.

8. Mandar cartas de agradecimiento a las cámaras y a los capacitadores después de cada seminario.

D. EVALUACION

1. Asegurarse que el contenido de los cursos sea útil, vigente y pertinente.

2. Asegurarse que los materiales de capacitación se encuentren al día y que se haya hecho todos los cambios requeridos.

3. Confirmar el cumplimiento y realización de los capacitadores durante las sesiones. Discutir los puntos más importantes que requieran atención especial con los capacitadores.

4. Evaluar la técnica de capacitación de los capacitadores después de cada seminario. Comentar sobre el uso y la aplicación de las técnicas presentadas.

5. Comentar las evaluaciones individualmente con cada uno de los capacitadores.

E. SEGUIMIENTO

1. Mantener listas al día de todos los capacitadores.

2. Mantener comunicación con los capacitadores y responder a las preguntas que tengan en relación a los materiales y a las técnicas de capacitación.

3. Mantener a los capacitadores informados sobre las actividades del proyecto mediante un reporte mensual.

4. Diseñar y dictar un seminaro de seguimiento sobre temas específicos que se relacionen con el desarrollo de los capacitadores. Pueden ser cursos de medio día a nivel de cámara.

D. REPORTES

1. Mandar a la Directora del Proyecto un reporte mensual de las actividades completadas.

2. Mandar a la Directora del Proyecto proyecciones de actividades a cumplirse durante el mes siguiente.

3. Mantener control del presupuesto de las actividades de capacitación.

4. Proveer al Coordinador Administrativo reportes financieros mensuales de los gastos de capacitación.

5. Escribir un reporte final en Febrero de 1986 describiendo todas las actividades de capacitación que se hayan llevado a cabo.

A P P E N D I X H

P R O P O S A L

F O R

S I X M O N T H E X T E N S I O N

O F T H E

AID/CA/FENAPI

CONTRACT No. 518-0011-C-00-4115-00

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June 4, 1985

Dr. James Finucane
Private Sector Officer
USAID/Mission to Ecuador
Quito, Ecuador

Dear Dr. Finucane:

I am pleased to submit for your consideration and approval a detailed plan of activities for the proposed six month extension of the AID/CA/FENAPI contract No: 518-0011-C-00-4115-00.

As discussed previously with you, the proposed extension will begin on September 1, 1985 and end on February 28, 1986. The purpose of this extention will be to concentrate and intensify the training activities of the project currently underway and to continue with the organization support provided to FENAPI by CA.

I will be happy to discuss these proposed activities with you as well as the progress of the entire project on my next visit to Quito in June 18 through June 25, 1985.

Thank you for your interest and support.

Sincerely,

Teresita Pérez
Project Director

TP:fck

Enclosures

I INTRODUCTION

Efforts are underway in the restructuring and restoration of Ecuador's depressed economy. In the past year, international development institutions such as the World Bank, the Interamerican Development Bank and the Agency for International Development, have been working with the Ecuadorean government in the development of strategies and policies that will impact and improve the country's depressed economic conditions. Some of the most important economic strategies proposed were directed towards the development and strenghtening of the private sector and the national institutions that support it.

At the onset of these efforts, in September, 1984, AID awarded a contract to Creative Associates to undertake a one year technical assistance effort for the institutional development of the Federación Nacional de Cámaras de Pequeños Industriales del Ecuador, in order to enhance the organization's ability to contribute and fully participate in these economic development activities.

In collaboration with AID, CA identified FENAPI as the most appropriate institution to be the recipient of these technical services. This selection was made based on our assessment of FENAPI's accessibility to the small/medium size industrial sector of the country and its growing reputation among Ecuador's private and public sector officials. It was evident that FENAPI had the potential to become a leading industrial organization in Ecuador with considerable influence in the economic and political spheres, but for some organizational weaknesses. As a well organized institution, it could participate more effectively in national and local policy formation. Through the contract with AID to provide technical assistance in Institutional development to FENAPI, CA assumed the responsibility of helping FENAPI achieve this position.

The membership of FENAPI consists of 18 chambers of small and medium size industrialists. These chambers are located in six zones or regions across the country. The member chambers are: Azuay, Bolivar, Cañar, Carchi, Cotopaxi, Chimborazo, Esmeraldas, El Oro, Guayas, Imbabura, Loja, Manabi, Pastaza, Pichincha, Tungurahua, Los Rios, Zamora Chinchipe, and Napo.

It should be noted that FENAPI's leadership is composed of some of the country's most prominent industrial and business leaders. This project intended to capitalize on the strengths of that leadership and develop it into a valuable resource for the organization. In addition, it was expected that, by the end of the contract period, FENAPI's leadership and its staff would be equipped to provide training and technical assistance services to its membership and to be able to represent their interests in the political and industrial arenas.

At the onset of this project, FENAPI's development potential as the country's leading advocate institution for the private industrial sector was considerable, but so too were its weaknesses, especially its lack of administrative and organizational skills. The primary objective of this project was to strengthen the institutional capabilities of FENAPI and to assist it to carry out its mandate of representing its membership and developing economic opportunities for them.

There are four principal tasks that were delineated in the project for the provision of technical assistance for institutional development to FENAPI. The project's scope of work reflected the needs identified by CA as a result of numerous interviews, meetings, and conversations between FENAPI, AID/Quito, and CA. These four technical assistance tasks are:

Task I. Development of Computerized National Register.

Task II. Development of Promotional and Public Relations Strategy for FENAPI Leadership.

Task III. Organize and Provide Technical Assistance in the Development of Membership Services for the Affiliated Chambers in the Provinces.

Task IV. Implementation of Technical Assistance in Leadership and Organizational Development.

During the past year a great deal has been accomplished. FENAPI has started to gain strength through the organization of its membership services and training services in advocacy and membership motivation. But this is only the beginning of the development; a great deal more is needed. The training and technical assistance services provided to FENAPI by CA have proven to be valuable. A positive impact has been achieved through them, but FENAPI and its membership need more support.

Because of this continuing need, CA proposes a six-month extension of the project. The purpose of this extension is to intensify the training and technical assistance activities that commenced as a result of the AID/CA contract in September 1984.

The following sections of this extension proposal will outline the first year's accomplishments of the CA/AID/FENAPI project, the proposed scope of work for the six month extension, and related budget.

II PROJECT ACCOMPLISHMENTS

(Sept. 1984 - Aug. 1985)

TASK I Computarization Services

In order to develop the proposed computerized national register of the FENAPI membership, CA performed the following activities:

1. An assessment of the information needs of the Federation and revision of membership questionnaire (survey) was performed. This assessment was conducted through visits to the eigtheen chamber members meetings with FENAPI leadership, and mailings requesting for information and feedback.

2. The previous needs assessment resulted in the development of computer specifications, guidelines for system's design and purchasing.

3. An IBM XT Personal Computer was selected and purchased as the most appropriate system for FENAPI's information processing needs.

4. FENAPI administrative staff was trained in basic word processing and introduced to the IBM PC system in a four day training seminar.

5. Dr. Paul Hoover was hired as the computer specialist responsible for the development and design of FENAPI's computer program. Dr. Hoover also provided technical assistance in the installation, staff training and follow-up of the computer services.

6. Provided Technical Assistance in the codification of membership information for computer input.

TASK II Development of Promotional and Public Relations Strategy for FENAPI Leadership.

1. A preliminary assessment of FENAPI's leadership promotion and public relations needs was performed. This assessment was conducted through site visits to the eighteen chambers, meetings with chambers and FENAPI leadership, conversations with public and private sector representatives and the national media.

2. As a result of the previous needs assessment, a public relations strategy for FENAPI leadership was developed. This strategy included:

a. The addition of a fulltime Executive Director responsible for the day-to-day administration of the organization and to become the central staff person involved with the project's planning and institutional strengthening tasks. Mr. Anibal Roballos was hired for this position.

b. To facilitate the acquisition of the Executive Director, CA developed a sub-contract with FENAPI which provided funds for an executive director salary and some additional supplies and equipment needs of the organization.

c. Design and development of FENAPI's newsletter. This newsletter is published monthly and has expanded in the course of the project from two pages to four pages.

d. A CA Project Coordinator was hired in Ecuador at the begining of the project to provide on-site technical assistance to the organization in the development of its administrative and organizational procedures. This Project Coordinator is responsible for the newsletter production and dissemination, and organizing technical assistance and training activities. Mr. Blacio Bermeo was hired for this position.

3. Implementation activities and information dissemination. A series of report analyses have been produced by the Project Coordinator about ongoing private sector and economic development strategies. These analyses have been distributed to the FENAPI leadership as briefing and policy papers.

4. Development of FENAPI Leadership Institute concept. The concept for this Institute was developed taking into consideration all of the developmental needs of the leadership in FENAPI. A series of seminars were designed under its auspices to promote and strenghten FENAPI's leaders.

TASK III Organization and Implementation of Technical Assistance in the Development of Membership Services for Affiliated Chambers in the Provinces.

1. A preliminary assessment of the membership needs for services and technical assistance was performed. This needs assessment was conducted through site visits to the chambers, chambers meetings and activities, and through conversations with FENAPI's leadership and representatives of the membership.

2. The previous needs assessment resulted in the development of training services. The FENAPI Leadership Institute extended its services to the membership. This activity involved the design and development of training seminars and materials in membership motivation, advocacy and lobbying. All of the materials produced were translated into Spanish and reproduced for all seminars held during the year.

3. Dr. Donald Smith was hired as the Senior Training Advisor, responsible for the design and implementation of the training modules and training for trainers activities.

4. Mr. Bolivar León was hired as in-country Training Director with the responsibility of coordinating all of the project's training activities.

5. Provided Technical Assistance in the development of annual membership conferences and extraordinary meetings. CA participated actively in the planning and development of the logistics activities for two major conferences, the 1984 Annual Conference in Guaranda and the 1985 semi-annual meeting in Ibarra.

TASK IV Implementation of Training in Leadership and Organizational Development

1. Training for Trainers Seminars: twenty national trainers have been identified among FENAPI's leadership and trained to conduct the lobbying/advocacy and motivation seminars. Two five-day training for trainers seminars and one three-day follow-up seminar have been held in the Quito, Guayaquil, and Cuenca regions. Each national trainer has been provided with a training kit containing the training manuals, instructions for trainers, and a set of visual aids or transparencies for the seminars.

2. Membership Seminars: A minimum of four advocacy/lobbying seminars were held in Quito, Cuenca, Loja, Ambato and Imbabura regions. Two additional seminars in membership motivation were held in the Quito/Cuenca/Guayaquil regions.

III PROPOSED SCOPE OF WORK FOR SIX MONTH EXTENSION

Creative Associates will intensify its efforts in the six months proposed for this extension period. This will be the case in all areas of its present activities but especially in the area of training. This new, expanded scope of activities will be carried out through the use of additional ecuadorean consultants based out of Creative Associates office in Ecuador and supported by CA administrative personnel. The scope of activities proposed for the six month extension will be as follows:

1. Institutional Development.

CA will continue to support FENAPI financially by the purchase of services necessary for its successful performance of the AID contract. Funds made available to FENAPI will enable it to continue to retain the services of its present Executive Director and to continue to publish the monthly FENAPI newsletter which has recently been expanded from two pages to four.

CA will develop a series of income-generating alternatives for FENAPI during the months of September through February with the goal of achieving FENAPI self-sufficiency in funding the Executive Director position and the newsletter.

Ms. Teresita Pérez and Mr. Thomas Scanlon of Benchmark will continue to make periodic visits to Ecuador for the purpose of monitoring and contributing to the CA technical assistance efforts with FENAPI. They will work intensively with FENAPI leadership during October when the organization may be going through a critical change in leadership. This role will also include assistance in

a) identification of new training modules for FENAPI;

b) assisting FENAPI to relate its activities to overall national plans and strategies aimed at developing small business and small industries.

c) identification of bottlenecks to FENAPI's further growth and development as a public advocate for small industry in Ecuador. Also the identification of resources, materials and personnel in the United States and elsewhere which can be useful to its [illegible] tion.

2. Computer Assistance Services

CA will deliver continued computer assistance services to FENAPI in a way which is consistent with CA's emphasis in increasing its presence, visibility and direct services in Ecuador.

CA will recruit and place "on-site" in FENAPI's headquarters for a three month period a highly skilled, bi-lingual technician who will assist FENAPI to maximize its use of the computer equipment provided under the terms of the present AID contract. This technician will:

- o train and upgrade present staff skills in word processing,
- o complete computerization of information on FENAPI's membership,
- o assist staff to become proficient in retrieval and analysis of computer data, and
- o identify other uses of the computer for the institutional needs of FENAPI.

3. Training

Based on the experience of past services to FENAPI, it is clear that training of several kinds is the need perceived by FENAPI's leadership and membership to be of greatest importance.

CA has enjoyed a highly favorable response to its public advocacy or "Lobbying" training program which has been described in previous sections of this work plan. Its module for motivational training will be field-tested in July 1985. The training activities proposed for the extension period will be:

-highly intensive (2 weeks per month)
-conducted by a cadre of Ecuadorian trainers who have been trained by CA
-marked by continued development of new modules in response to the expressed needs of FENAPI members.

a) Intensified Training Effort: from September through February, CA will conduct a total of 12 weekend training courses, six sessions in public advocacy and six in motivation. This will enable FENAPI and CA to provide a training session in every local chamber which is a FENAPI member. Many will receive both courses.

It is evident at this point that the most critical task in the development of FENAPI as a strong influence in the national economic and political life of Ecuador is to strengthen the member chambers. The CA/FENAPI intensive grass-roots training initiative will directly address this critical need.

b) A Cadre of Ecuadorian Trainers:

The CA training efforts during the extended period will utilize trainers already trained in the use of the motivational and public advocacy curricula. CA and FENAPI will have eight trainers (four in the Quito area and four in Guayaquil) who will be prepared to continue these grass-roots courses. These trainers will be rotated so that the intensive training effort is not an undue burden on them. This activity will be coordinated by Mr. Bolivar Leon, the CA Training Director in Quito. Logistics will be handled by Mr. Blacio Bermeo, who will also assist with the training programs.

c) Development of Executive Training for Small Industrialists:

Another need of FENAPI members and local chambers is in training to improve their business management or executive skills. Creative Associates will develop an additional training program in executive management during the six-month extension. CA has developed a highly creative and promising approach to accomplishing this: It will consist of the following steps: (for scheduling of these steps, see the enclosed implementation schedule Pages 11-12).

- Executive Profile: Using training techniques already established as effective, CA will conduct a three-day work session in Ecuador with a cross section of FENAPI members. During this session, which is essentially a brainstorming session, an attempt is made to identify the activities and needs which are most common to those individuals in running their businesses. Through this 3-day process, a rough guide is developed about which business executives training exercises are most necessary. The results of the executive profile development session are then configured and checked against the realities in Ecuador. When fully developed, it represents an excellent guide to the special training needs of FENAPI's members.

- Search for Other Modules: A number of courses already exist for the training of small business managers. There are institutions in Ecuador which offer such courses. CA will do an alternative and model search so as to avoid duplicating efforts made elsewhere. It will then match the best of this material to the required needs in the Executive Profile of a FENAPI member. The result will be a business and executive management course uniquely tailored for FENAPI's members.

- Field Testing: Within the six month period proposed in the extension, CA will develop the Executive profile, the executive business training course and field test the course in Ecuador.

PROPOSED SIX MONTHS TRAINING SCHEDULE

SEPTEMBER

Sept 1 - 11	Preparations/Set up of Executive Profile Meeting
Sept [illegible] - 15	Executive Profile Meeting
Sept 16 - 30	Analysis/Configuration of Profile
	(Note)* Schedule additional training activities in motivation and public advocacy. A minimum of two seminars will be held.

OCTOBER

Oct 1 - 15	Validation Activities of Executive profile in Ecuador by CA Training Director
Oct 15 - 31	Final configuration of profile data base on input from Ecuador.
	(Note)* Same as above

NOVEMBER

Nov 1 - 29	Design of small industry executives seminars based on executives profiles.
	(Note)* Same as above

FEBRUARY

Feb 1 - 14	Implementation of pilot seminar for small industry executives
Feb 14 - 28	Analysis of results of pilot test and refining of seminar modules.
	(Note)* Same as above

DECEMBER

Oct 1 - 30	Detailed development of Small Industry Executives seminars (Washington, D.C.)
	(Note)* Same as above

JANUARY

Jan 1 - 31	Ecuadorian validation of small industry executive seminar (Ecuador)
	(Note)* Same as above