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FINAL REPORT

PRESENTED TO THE

NATIONAL COMMUNITY DEVELOPMENT SERVICE

AND

USAID/BOLIVIA

BY

PEDRO PEREZ GABINO  
COOPERATIVE TRAINING ADVISER PRNA

MAY 15, 1978

CONTRACT COB/AID-511-97

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Cooperative Training Advisor

Report Period - May, 1976 - April 30, 1978

1. Introduction

This report represents the activities of the Cooperative Training Advisor which reflects the achievements in its specific functions within the Promotion and Training Department, in addition to the activities realized within the global program of the National Community Development Service.

2. Accomplishments

On arrival to the country on May 15, 1976 we found that there were only four months to implement CROFOC's Project and to initiate disbursements to the Rural Organizations which would be selected as beneficiaries. The project was barely initiated as regards organization, regulations, and all documents required for its implementation. Moreover, in my opinion the project's design was not feasible for several reasons which will be specified further on. Due to the effort mentioned, the Chief of the Advisory Group and I, with the approval of SNDC decided that all our efforts in the first stage of the program should be directed to offer the necessary technical assistance to put CROFOC's Project in operation, leaving in second level my work as Cooperative Training Advisor.

A. PLANNING AND CROFOC'S IMPLEMENTATION

My efforts and technical assistance were principally directed to the following activities:

- 1) Draw up CROFOC's Credit Regulations;
- 2) Design and preparation of bookkeeping and control formats of CROFOC activities;
- 3) Design and preparation of CROFOC's legal documents such as contract drafts, notes, and other documents;
- 4) Design and preparation of basic bookkeeping and control formats to be realized by rural cooperative and organizations recipients of CROFOC's credit system;
- 5) Teach the key personnel of SNDC's Central Office and the Advisory Group the way to use the bookkeeping formats to be utilized by rural cooperatives and organizations recipients of credit under CROFOC's program. In addition I offered to teach the technical personnel of SNDC Regional and Central Offices how to use the prepared bookkeeping and legal documents;

- 6) Preparation of the bookkeeping Manual for Agricultural Cooperatives and the realization of qualifying courses for SNDC's technical personnel on the implementation of same at CROFOC's cooperative credit recipients level. Approximately 80 SNDC technicians participated in the two qualifying courses;
- 7) Preparation of the credit ruling draft for cooperatives and for CROFOC, the latter a revision of the original.

B. REVISION OF COOPERATIVES DEVELOPMENT POLICY CONTAINED IN THE GENERAL ACTIVITIES PLAN

After analyzing SNDC's General Activities Plan, I arrived to the conclusion that same was not feasible from an economic point of view it had technical faults in the field of cooperatives development. I submitted the corresponding reasons and began a convincing campaign within the SNDC and USAID's advisors to revise the policy and make the necessary changes. Also I promoted a three-day seminary with personnel of the Service, USAID, and INALCO and the Advisory Group in which the different alternatives were analyzed, establishing a favorable opinion to introduce the necessary changes. Together with USAID's Rural Development Advisor, we planned two trips of teaching and study of the cooperative movement in some countries of Central and South America, which contributed to the changes that later on were introduced in the project's cooperative development policy. Nearly simultaneously I attended to a two-week seminary on cooperative development for the SNDC's principal officers. Later on, most of SNDC's officers who attended the aforementioned activities took part in a laboratory work in which it was discussed and changed the cooperatives development policy, modifying the established General Activity Plan. With my substantial and decisive participation, it was determined that SNDC should promote the organization and development of large basis Cooperatives with a variety of services so that they may attain their auto-financing in a relatively short period.

Then I prepared drafts of standard rules, administrative policy and documents describing the new policy on cooperative development. All this material helped to initiate the Integral Cooperatives organization. Besides, on basis of these documents I participated in several meetings explaining same to SNDC and INALCO personnel. I participated actively with SNDC Officers to explain and eliminate all doubts and differences of opinion which INALCO Officers had regarding Integral Cooperatives.

Once it was decided the organization of the first three pilot Integral Cooperatives, feasibility studies were realized and I had the opportunity of participating in the analysis and discussion of the studies and to propose my remarks and recommendations in this connection.

C. SNDC AND COOPERATIVES BOOKKEEPING

The mini-cooperatives participating in CROFOC credits had no bookkeeping records to reflect their operations. To amend this condition I designed and prepared the corresponding formats which served to keep the accounting operations in order and which they also served as a proof before proceeding to the preparation of the Rural Cooperatives Bookkeeping Manual which then I designed and drafted. I travelled to two Regional Offices to give a three day seminary in which the SNDC Regional and Zonal Offices personnel were trained and directed on the aforementioned formats. It was supposed that these officers had a basic knowledge on bookkeeping matters, however I noticed that this was the first time in their lives that they worked with bookkeeping. For this reason I promoted the realization of two bookkeeping courses of three weeks each one, which were realized with the participation of approximately 80 SNDC's technicians. Mini-Cooperatives personnel were not included since they did not have paid personnel who may do this kind of work.

I also participated in the revision of the bookkeeping system which SNDC had regarding CROFOC and their additional operations. After several visits to some Zonal Offices and to the four Regional Offices I gave the necessary recommendations to improve said system.

D. TRAINING

In another section of this report I mentioned that I could not work as Training Advisor in the way stipulated by contract and my functions description; this O.K.'d by USAID and SNDC's approval. The lack of an advisor in the organization, development, administration, and rural cooperative credit field, and having these aspects priority with SNDC, forced me to cover said activity fields, taking SNDC advantage of my experience and preparation in said specifications. 90% of my time was dedicated to this kind of work and only 10% to my contractual duties. Another factor which contributed to my not participating in training activities was the lack of economic support and the importance which SNDC Officers gave to these activities.

Notwithstanding said reasons, I participated in several training activities. In short, I attended the following activities and operations:

- 1) I helped the Promotion and Training Department in drafting the annual activities plan, including the drafting of their corresponding budget.
- 2) I participated in the preparation, and in some cases, in the implementation of 131 training courses which took place during the

project's first year: principally in those which were given to SNDC personnel; likewise I participated in most of the activities realized during the project's second year. I participated directly in several training courses given at level of Base Associated Group of Integral Cooperatives.

- 3) I tried to help expedite the equipment purchase system of the Training and Promotion Department to be acquired with funds of loan 055, but my participation was useless. USAID's and the Bolivian Government's belabored purchasing system were the negative factors to thwart my efforts in this connection. During the period of my stay in the program (2 years) only part of the required list was obtained.
- 4) I submitted a proposal to change the curriculum which was being used at different levels of the rural training program. Most of my proposal served as a basis to make the recent curriculum changes.
- 5) I participated in the revision and realization of the coordination system of the promotion and training work which this Department realizes.
- 6) I prepared the draft of visual material which is being used in the promotion and organization of Integral Cooperatives.
- 7) I outlined the control and budget formats which are being used in the implementation of the training activities, including settlement of accounts.
- 8) I took special participation in the following training activities:
  - a. Course on organization, development, and administration of Integral Cooperatives given to SNDC Zonal and Regional technicians.
  - b. Course on Integral Cooperatives bookkeeping given to technicians of SNDC Central, Zonal, and Regional Offices.
  - c. Laboratory work on large base cooperatives and change of policy on cooperative development with the participation of SNDC high level officers.
  - d. Evaluation Seminary and Planification Round Table for SNDC Promotion and Training Department personnel.
- 9) I prepared the contents of courses at levels I and II regarding cooperatives organization and administration given to rural men.

- 10) I participated in the planning and implementation of the training course on administrative aspects of SNDC given to personnel of SNDC administration department.
- 11) I participated in the meeting which took place with USAID and SNDC technicians to organize the SNDC scholarship Committee and proposed the general outlines which same should contain.
- 12) I participated actively in the preparation of the 1978 Operative Plan of the Promotion and Training Department.

I may conclude that on terms of number of course, the Promotion and Training Department superseded the planned achievement during two years (1976-1977) but not in terms of funds as most of the courses realized were at community level and these do not require large disbursements.

#### E. OTHER ACTIVITIES

- 1) I participated, in a special way, in the preparation of the document "Recommendations for the Furtherance of Rural Cooperatives and Judgement of Cooperative Function" which the Advisory Group submitted to the National Service of Community Development in December 1976 and which contributed as a basis and instruction for the present development and functioning of Integral Cooperatives.
- 2) During the two years of my stay in the program. I replaced the Group Chief in his absence realizing all the work peculiar to said function.
- 3) I participated in Regional and Central Credit Committee meetings giving recommendations and remarks which were always accepted by same.
- 4) I attended to all Technical Council meetings, participating actually at Central, Regional, and Zonal levels, specially in the rural cooperative and credit development field.
- 5) I accomplished, after several and constant efforts, to obtain a larger support for the Promotion and Training Department from SNDC's manager in relation to channeling of funds for training activities.
- 6) I participated in the collection of information necessary for pre-selection of a zone as possible organization of an integral Cooperative. On basis of the investigation and information collected, we recommended to perform the social-economic study in the Tarija Zone.

### 3. Methodology Used

The methodology I used in the realization of my functions include the following principal elements:

- 1) I acted as Advisor in the majority of the cases and not as executor, though in some activities I was asked to be more executive and that my intervention may serve as an example to the Promotion and Training Department personnel.
- 2) I promoted the group and team work with my counterparts as well as with the members of the Advisory Group. This facilitated the coordination work.
- 3) I encouraged the coordination between SNDC officers and other institutions which had signed working contracts with the Service.
- 4) The problems and faults found in SNDC development activities, and specially in the cooperative and training fields, I specified in writing and with the necessary recommendations to solve them.
- 5) I encouraged the institution's high level officers and the rest of the personnel to take notice of the repercussion which may have the donations or grants system in front of the self-help system developed by SNDC in all its activities with the rural population.
- 6) I cooperated in whole and participated in all the fields of my specialization and experience when it was necessary without waiting to be asked to.
- 7) I promoted the Promotion and Training Department personnel to use the auto-critic system so as to improve the activities.
- 8) I encouraged the use of periodical evaluations of the work done so as to look for a solution of the problems and be more efficient.
- 9) With a high degree of human relations I obtained the improvement of the working attitude and devotion to the Institution of the technical personnel of the Promotion and Training Department and of other SNDC departments.

### 4. Problems Found and Recommended Solutions

#### Problem

(1) The Audio-visual equipment planned to be purchased with loan funds has not yet been acquired, affecting the technical and methodological good work of the Department. This is largely due to the purchasing system used by USAID and SNDC.

#### Solution

To correct this situation, SNDC should ask USAID to establish an advance of funds which should function as a retating fund. On realizing the equipment

purchase, the bills would be submitted to USAID for its reimbursement and replace the funds to its original amount.

Problem

(2) The number of subjects in training courses are too numerous, affecting the degree of the participants understanding or absorption and the quality of activity.

Solution

In the courses to be programmed in future, the number of subjects should be limited using as a basis the participants degree of education, the activity and methodology to be used.

Problem

(3) The aspect of administrative support of say the provision of funds by the La Paz Administrative Office, is still deficient. The funds for the courses, in spite of having been requested in ample time before the activity realization, are provided after the courses are initiated.

Solution

The solution may be improved if the funds, quarterly appropriated for training activities, are remitted in its totality to the corresponding Regional Offices so that they may be applied according to the courses progress. Another possibility would be to establish a rotative fund which may be advanced by USAID and according to the courses' progress they would be reimbursed with Service's funds.

Problem

(4) There is no specialized personnel at level of the Training Department nor Training Centers in priority subjects within the present Service's activities program, viz.: Administration, cooperativism, Marketing - who could participate in the operation of training courses.

Solution

This situation could be improved through the realization of a scholarship program, abroad or locally, to train SNDC personnel on said subjects.

Also, the selection of personnel for the vacancies which may turn up should be covered with specialized personnel in the aforementioned subjects. Priority should be given to this kind of activity so that in a two-year period SNDC may have specialized personnel in several subjects and not have to depend in foreign advisory.

Problem

(5) The selection system of participants for training courses is deficient permitting a high grade of heterogeneity regarding academic preparation and experience level, affecting the courses' effectiveness.

Solution

A more adequate selection system should be studied to help solving said problem and which at the same time would help to reduce the number of participants to the courses. It should be emphasized in obtaining quality in the training activities instead of quantity.

Problem

(6) There is no voluntary leaders team at community or cooperative level duly trained who would assume training responsibilities at said levels.

Solution

This situation could be improved by establishing an adequate leaders selection system in the different communities and cooperatives, then put them in an intensive and planned training program, establishing as far as possible specialization fields. These leaders should be given a special identification and the ones surpassing in their activities should be encouraged with special prizes such as scholarships, study trips, and specialization diplomas, etc.

Problem

(7) The system of following up the training activities is not the most effective.

Solution

A follow up system should be established including, as part of the courses or activity, the establishment of specific purposes or projects to achieve, once the activity is completed and the participants return to their corresponding community or cooperative. A program of visits to the different projects, communities, and cooperatives should be prepared for officers of the Training Centers and of the Promotion and Training Department so that an adequate follow up could be given to the referred activities. Besides, an encouraging system could be established to reward the surpassing ones.

Problem

(8) No training courses have been given to SNDC technicians regarding Integral Cooperatives.

Solution

Priority should be given to training activities, in service, to this type of subject. This should be effected during the course of this first quarter of 1978.

Problem

(9) There is a lack of direction of the Promotion and Training Department members, at national level, on Informal Education techniques and system.

Solution

Using the new Training Advisor's experience and preparation in this field, a plan of activities during the whole year should be programmed where this subject may be developed. Moreover, national technicians specialized in the subject should be used, such as Professor Mario Guzman to instruct in this matter. The services of said professor could be engaged to participate in planning and development this kind of activity.

Problem

(10) The context of the training courses at different levels and programs do not have the necessary number of subjects related to cooperative development and specially to integral cooperatives in spite of my having submitted to the former Department Chief a scheme containing these subjects.

Solution

All the material in use should be revised as soon as possible to make the corresponding changes and to incorporate a larger number of subjects on cooperativism and specially on integral cooperatives. Also the different Department Chiefs and other specialized technicians should be incorporated to adapt technically the different subjects and matters

Problem

(11) There are still deficiencies in the provision of adequate audio-visual material to implement the promotion and training activities.

Solution

The need for said material should be established and planned as soon as possible, and appoint the corresponding technicians at Central Office level as well as Training Centers to prepare the necessary material. Once said work is received, a revision should be made to reproduce them in adequate quantities.

Problem

(12) The training centers are still being multiplied without having the corresponding necessary and adequate equipment. Likewise, the design and construction of the centers are not functional (example: Totacoa's Training Center). Moreover, the maintenance of same is deficient.

Solution

To select one of the centers in operation and reconstruct same in an efficient and functional form, furnishing same with all the necessary audio-visual and other equipment, furniture and all the other indispensable services, so as to offer the training activities participants a minimum of confort. This center would serve to develop the activities at national level. To cover the necessities at local level each region would be furnished with a mobile equipment with a minimum of materials and audio-visual equipment. Moreover, a rental item should be appropriated in the budget for training and promotion so that in cases requiring to realize activities with boarding participants, premises could be rented to develop same.

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