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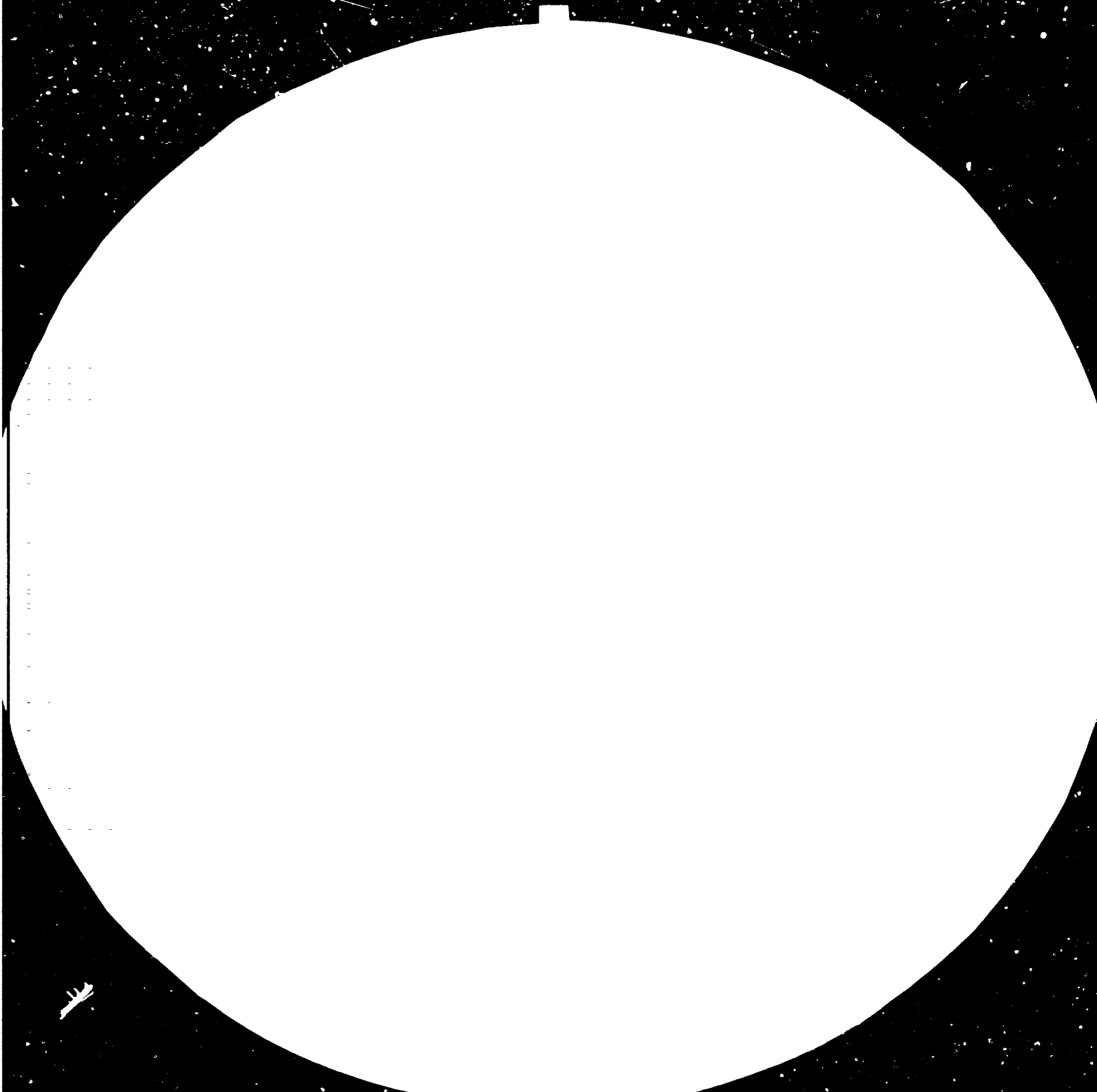
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SEMINAR ON THE PLANNING AND DEVELOPMENT OF TRAINING SERVICES

AT PUBLIC INDUSTRIAL ENTERPRISES IN LATIN AMERICA,

ORGANIZED BY UNIDO, CLAD,* ICPE,* AND ESAP*

in Bogota, Colombia

from 4 to 9 July 1983

Conclusions and recommendations **

1043

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* CLAD - Centro Latinoamericano de Administración para el Desarrollo.

ICPE - International Centre for Public Enterprises.

ESAP - Escuela Superior de Administración Pública.

** The conclusions and recommendations were prepared by the rapporteur on the basis of the working papers that were presented and the discussions that took place at the Seminar.

This report has been translated from an unedited original.

General conclusions

1. The institutions represented at the Seminar belong to the sectors which either supply or have a requirement for training services at public industrial enterprises in Latin America, a region whose countries differ widely in terms of their size, their economies and their policies and where the public enterprises also differ in size, organization and relative involvement in the industrial sector. This diversity makes it impossible to propose any one single solution, but at the same time contributes to a wider range of approaches, all of them worthy of examination, to the problems facing the public enterprises of the Latin American region in the light of the specific conditions under which they operate.

2. The planning, development, adaptation and implementation of training programmes requires, as a prerequisite, that consideration be given to a number of basic facts and requirements, viz.:

(a) The necessity of developing an awareness of the need for a clear understanding of the objectives of public industrial enterprises in Latin America, together with a profound belief in the importance and justification of these enterprises;

(b) The fact that the management of public industrial enterprises transcends the institutional limits of these organizations and is directly affected by the political, economic and social decisions taken at the governmental level;

(c) The need for an awareness of the importance of the public industrial enterprises to the rational economic and social development of the countries concerned;

(d) The need to take into consideration local, national and subregional differences, and to approach the problem in terms of changing societal conditions.

3. An essential premise of managerial training is that management problems in public enterprises must be approached with academic rigour at the technical level and at the same time with common sense.

4. The management function consists essentially in a nearly continuous process of critical, analytical and creative decision-making geared to the social, political and economic conditions of the enterprise.

5.   It is imperative that public enterprises establish the necessary machinery to place their work in the training and development of human resources on a systematic basis so as to keep abreast of the knowledge, skills and attitudes needed to cope successfully with the changes that are constantly affecting these organizations.

This systematizing must begin with the establishment of formal training and development programmes in order that this effort may be effectively co-ordinated.

Conclusions regarding certain aspects of the planning of human resources and the identification of training requirements

1.   The planning of human resources must be co-ordinated with the enterprise's strategic planning, but is subject to constraints in the form of government policies.

2.   Manpower planning is an important element in determining training requirements and policy and must be based on the supply and demand situation in the labour market, with care taken to correct possible imbalances.

3.   In formulating managerial training programmes for senior and middle . management, it is essential, given the differences between these two echelons, to use different schemes or models for identifying the training requirements (in terms of content, methodology, etc.) for each of them.

4.   The identification of training requirements will be largely determined by the area of activity of the enterprise, its objectives and specific problems and also the external factors affecting it.

5.   There is little previous experience regarding the use of models to determine training requirements at the highest levels, and there is no decisive evidence regarding the efficiency or effectiveness of these models. Accordingly, it will be necessary to devise a standard series of factors to be taken into account when identifying the variables which have an effect on training requirements:

(a) A critical factor in this connection is the involvement of the top management of the organization and of the co-ordinating and oversight body which supervises it (ministry, holding company, etc.);

(b) The higher his position in the hierarchical structure, the greater the number of unplanned decisions for which the manager is responsible;

(c) Crisis as a generator of new requirements;

(d) The future as an emerging factor affecting new requirements.

6.   There are situations in which top management does not play an active role in the determination of requirements, but there are also cases in which entrepreneurs are unable to diagnose their own needs.

Conclusions regarding some aspects of development of curricula for the formulation of training programmes for senior and middle management

1.   The development of training curricula for the executive level requires a careful definition of the role of senior and middle management. One must be clear as to what kind of persons take over these positions, the first step being an analysis of their background to determine whether their previous experience lay in the political or the technical area.

2.   The training curriculum for public-sector entrepreneurs must include instruction in the techniques of strategic planning so as to enable these persons to acquire knowledge in such areas as the identification of objectives and the formulation of policies and strategies. In addition, the curriculum should aim to develop the manager's interpersonal and group skills so as to enable him to influence the attitudes and values of his staff.

3.   Regarding the introduction of technology into curricula, care should be taken to limit it to the conceptual and methodological plane, avoiding it in programme content, since this must reflect the specific conditions of the enterprise as revealed by an analysis of its requirements.

4.   Managerial training programmes must include continuous feedback processes designed to encourage thoughtful, analytical, critical and creative attitudes.

5.   The persons to be trained should be included in the development of the curriculum.

6.   Training programmes must include aspects reflecting the real conditions of the enterprise and also the possibilities of innovation. These programmes must also reflect something of the ambiguities of the managerial environment.

7.   In planning the curriculum every care must be taken to ensure that it effectively meets the requirement identified, with consideration given to alternative programme material.

Conclusions regarding teaching methods and the preparation of teaching materials

1. By its very nature, managerial training at public enterprises in the industrial sector is multidisciplinary. The teaching approaches, methods and materials used in the training must be elements in a strategy of change and not merely produce a superficial transmission of information.

2. With respect to teaching methods and materials, there are no solutions or prescriptions which are wholly and without exception transferable from one country to another; rather, such solutions and prescriptions must be adapted to the political, economic and social conditions, evolution and outlook in each country.

3. The training methodology must be tailored to the problems confronting the specific country's public enterprise sector, with particular attention given to such basic factors as conflicting objectives, the relationships between the public industrial enterprises and the State, and structural alternatives generated.

4. The techniques used in training managers at the lowest supervisory levels are for the most part ten or fifteen years old, but studies designed to improve them are being envisaged.

5. It is essential that a foundation be laid for applied socio-economic studies that will make it possible to devise, adapt and transmit administrative technology through the formulation of independent teaching materials and appropriate methodologies.

6. The teaching methods used in managerial training must be dynamic (involving case studies, workshops, enterprise game-plans, seminars, and the like) and require the use of independent teaching materials designed to reflect the real situation of the participants.

7. It is particularly important to note that a number of Latin American countries have already developed their own independent teaching materials and are applying advanced training methods - case studies, technical and behavioural models, and computer-assisted simulation models.

8. Training packages should be developed only within the specific framework of application.

Conclusions regarding the selection and training of instructors

1. In selecting the teaching personnel for top-level management training at enterprises, the basic criterion to be considered is the would-be instructor's thorough familiarity with the area of knowledge in question, coupled with the ability to teach using teaching methods tailored to the knowledge to be transmitted. However, even where the potential trainer lacks the desired experience and teaching ability, this should not be regarded as a reason to reject him.

2. Another criterion that needs to be considered when selecting the teaching staff is the extent of their commitment to the values of the enterprises and of the social system of which it is a part.

3. Another factor of importance in the selection process is the requirement that the instructor be capable of the high degree of analysis and insight required of someone engaged in training senior managers.

4. Instructors must be able to make effective use of the teaching methods and audiovisual aids appropriate to the technical content of the training programme they are following.

5. An enterprise training programme for managers which employs teaching methods appropriate to the level will not only provide experienced managers, but will make it possible for these same managers to act as instructors within their own organizations as well as at pertinent training institutions.

6. A priority requirement as part of the effort to set up operating training units at each enterprise is the formulation of a training programme at the national level for training co-ordinators (to be responsible for training at public enterprises).

Conclusions regarding evaluation and follow-up of training

1. The purpose of evaluation is to assess the progress of the training programme, its effectiveness, its impact and its appropriateness to the objectives envisaged.

2. The evaluation of training results at public enterprises is being conducted in a very unsystematic way.

3. The basis for effective evaluation of training programmes must take the form of clear-cut and precise objectives, possibly defined in behavioural terms.

4. The training evaluation exercise must be a continuous and systematic process covering all aspects of the training: requirements, teaching methods and materials, audiovisual aids, instructors, participants, curricula, etc.

5. Questionnaires, when used, should be rationally employed and carefully analysed.

6. Any evaluation method should clearly ask the questions of why, what, for whom, how and when the evaluation is to be carried out.

7. The desirability of conducting or not conducting an evaluation should be analysed in the light of the associated costs.

Conclusions regarding certain aspects of an information system on training requirements and opportunities

1. Training opportunities emerging from the system to be established must be available to the user within the shortest possible time.

2. When seeking opportunities, care should be taken to avoid duplication of effort in the design of programmes and to hold costs to a minimum.

3. The professional training and development associations that already are in being or are planned could provide a focal point for the collection and dissemination of information on training opportunities at the national level.

4. It must be determined whether there are information systems for training opportunities at subregional or national institutions.

5. As an initial step it would be useful to prepare an institutional guide for the Latin American region indicating the available training facilities and the kinds of training programmes offered at institutions of the type mentioned above.

6. This guide might include public enterprises which would like to have or already have the facilities necessary for the organization of in-plant training programmes.

General recommendations

1. The institutions which are providing or would like to provide managerial training for public industrial enterprises are urged to investigate the best approaches, in the light of the conditions in each country, either for carrying out on their own or for finding ways of having carried out studies designed, at a minimum, to produce the following basic information on public enterprises in the industrial sector:

(a) Systematic information on their origin and evolution;

(b)   Indicators of economic importance;

(c)   Structural analysis of the sector;

(d)   Analysis of the sector's decion-making machinery;

(e)   Case studies;

(f)   Analysis of specific management problems.

2.   Public enterprises, their oversight agencies and training organizations
are urged to promote awareness at public enterprises of the need to identify
objectives and formulate their own policies for the development of human
resources, especially at the senior and middle management levels.

3.   Management training organizations, and also UNIDO, the International
Centre for Public Enterprises (ICPE), and the Latin American Centre of
Management for Development (CLAD) are urged:

(a)   To carry out activities designed to assist the Governments of the
various countries to find ways of establishing clear industrial development
policy objectives;

(b)   To develop an appropriate mechanism for the selection of a group
of researchers and the organization of workshop-seminars for the training of
researchers in the public enterprise area.

4.   It is recommended that ICPE should continue its studies for the
identification of training requirements, manpower planning and the evaluation
of training programmes, and it is urged to prepare manuals on this subject
reflecting the experience of Latin American public enterprises.

5.   It is recommended that CLAD should:

(a)   Continue its research efforts, particularly its post-graduate
course for the training of public sector research specialists;

(b)   Continue its promotional activities and its regional events for
the exchange of experience regarding managerial training for the semi-
public sector.

6.   It is recommended that UNIDO should continue its efforts under the
centres of excellence programme and extend this programme to as many Latin
American countries as possible, with the aim of:

(a) Systematically identifying the institutions or facilities
(research centres, industrial plants, etc.) with the ability to conduct
training programmes in an adequately competent manner;

(b) Promoting scientific research at training institutions in such
areas as curriculum development, training methodologies and the preparation
of teaching materials, for the purpose of developing independent teaching
facilities;

(c) Lending assistance to institutions with the ability to offer
training services, by helping them in the preparation of teaching materials
for their programmes, furnishing them with audiovisual equipment, providing
for the basic and further training of instructors through fellowships,
assigning professional specialists to give specific programmes or develop
new ones, etc.;

(d) Continuing to organize refresher and brainstorming seminars on
critical aspects of training, such as the identification of requirements,
curriculum development, teaching methods and materials, training of
instructors and evaluation of training.

7.   It is recommended that the above-mentioned institutions should continue
their efforts at co-operation among themselves and that this effort should
be made a part of the work of other local, national and regional organizations,
thereby strengthening it. By way of example, the following are some of the
possibilities that were discussed at the Seminar:

- The implementation of instructor training programmes at the sub-
  regional level;

- Participation in management development programmes;

- Provision of teaching materials;

- Provision of independent case studies;

- Provision of simulation models for use in management development;

- Provision of specialists to deliver programmes on specific subjects,
  etc.

8.   Further, it is recommended that UNIDO should prepare a publication on
this Seminar, to include chapters on the subjects covered and to reflect, in
some depth, the theoretical and conceptual aspects and practical experiences
discussed. It should also include abundant bibliographical references.

9.   Finally, the participants in the Seminar have requested that the Seminar organizers should send the final report to the various institutions and/or enterprises indicated by the participants themselves.

NOTE: Following the reading of this report by the rapporteur, the participants in the Seminar requested that the report should express their gratitude to the Colombia Higher School of Public Administration (ESAP), the United Nations Industrial Development Organization (UNIDO), the Latin American Centre of Management for Development (CLAD), and the International Centre for Public Enterprises (ICPE) for the efficient way in which these institutions had organized and carried out this Seminar, and also that it should thank Mr. David Edelman (CLAD) and Mr. Sergio Gardelliano (UNIDO) for their excellent work as moderator and rapporteur, respectively, at this Seminar.