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DEPARTMENT AT JAMPRO

DP/JAM/88/009

JAMAICA

Technical report: Strategic management process, intervention at  
Citrus Growers' Association of Jamaica\*

Prepared for the Government of Jamaica  
by the United Nations Industrial Development Organization,  
acting as executing agency for the United Nations Development Programme

Based on the work of E. Ennen and R. Hopley, experts in  
industrial organization and system of production

Backstopping officer: B. Galat,  
Agro-based Industries Branch

United Nations Industrial Development Organization  
Vienna

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\* This document has not been edited.

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EXPLANATORY NOTES

CDC	Citrus Development Company, Ltd.
CGA	Citrus Growers' Association, Ltd., established 1944
CPC	Citrus Processing Company, Ltd.
EEC	European Economic Community
ISO	International Standards Organization
JAMPRO	Jamaica Promotions Corporation
JCG	Jamaica Citrus Growers, Ltd.
PIOJ	Planning Institute of Jamaica
SMG	Strategic Management Group
UNDP	United Nations Development Programme
UNIDO	United Nations Industrial Development Organization

COMMENTS BY THE BACKSTOPPING OFFICER  
OF THE PROJECT

Messrs. R. Hopley and W. Ennen were recruited as short-term consultants in order to develop a strategic plan and advise the Citrus Growers' Association with regard to the establishment of working linkages and cooperation among Jamaica's fruit growers, processors and exporters.

The experts' report contains practical recommendations for the forthcoming implementation period of Jamaica's citrus industry's modernization programme. Based on the experts' recommendations a special 2 days seminar took place at the Citrus Growers' Association for interested parties at the beginning of March 1992.

## ABSTRACT

Professor Robert Hopley of Hopley & Associates and the University of Massachusetts and William Ennen of the Donahue Institute for Government Services at the University of Massachusetts collaborated on an intervention in the citrus industry sector of Jamaica. This consisted of:

1. analyzing the situation of Citrus Grower's Association (CGA)
2. analyzing the capabilities of JAMPRO to assist
3. developing alternative intervention processes
4. discussing these alternatives with the significant decision makers and potential participants at both JAMPRO and CGA
5. gaining acceptance that a strategic management group (SMG) consisting of CGA board members, it's subsidiary Jamaica Citrus Grower's (JCG) executives and JAMPRO personnel should be formed to initiate a strategic management process in the first quarter of 1992
6. assisting in selecting the participants
7. educating this group in the strategic management process
8. designing and conducting the kick-off and first strategic planning meeting to discuss the mission, goals and objectives of CGA
9. defining the process for staff work and getting all teams to develop work plans for the internal and external environment assessment stage. Their job description is reproduced in Annex I.

One measure of the success of the project is that the SMG aggressively adopted a work schedule for themselves that was slightly faster than that being proposed by the consultants. Also, after the expiration of this contract, CGA and JAMPRO have paid for the return of Professor Hopley to assist in the strategy formalisation and implementation planning stages. This activity is a focus of considerable interest and commitment by the SMG and it may not be too soon to identify this as a critical turning point in the future of the Jamaican Citrus and Dairy industries.

The second significant objective was to demonstrate to JAMPRO personnel the fundamental role played by the strategic plan in providing direction to all business improvement at the industry and company level. This has been achieved up to the Senior Director Level in the Agriculture & Agro-Industries Office, and also the Technical Assistance, Industry Modernisation and Design Centre. It is the consultants' opinion that JAMPRO ought to be responsible for and capable of providing strategic management assistance from within their own ranks on a routine basis rather than needing off-island consultants. There are three alternative recommendations on how this might be achieved within this report.

This work would have been impossible without the comprehensive support of Mr. John Wilson, on assignment from UNIDO/UNDP to JAMPRO. His thoroughness and attention to detail set the stage upon which we

have all acted. Mr. Norman Prendergast, Mr. Lennox Picart, and Ms. Kathleen Goldson of JAMPRO have also played very significant roles. With the addition of Mr. Aaron Parke of JAMPRO they will have even more to do in the future support of CGA.

Finally I would like to extend my personal thanks to Ms. Hope Brown in particular, and other secretarial and other administrative support personnel of JAMPRO, who have been consistently efficient and friendly.

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## INTRODUCTION

### 1. Overview

Mr William Ennen (18 days) and Professor Robert Hopley (24 days) each had split contracts to improve the Jamaican citrus industry. The private entity chosen to effect this change was CGA, and a flexible schedule of joint on-site visits to achieve the objective were planned. Ennen did the initial data gathering and preliminary analysis of alternative interventions on his first visit in Sept/Oct 1991. In Oct/Nov both consultants then further analyzed and discussed the data and developed the primary recommendation of introducing a strategic management process to CGA to be significantly supported by JAMPRO.

While in Kingston on another mission in Nov/Dec 1991, Hopley gained the separate acceptances of the two key sponsors, Mr. Ivan Hope Tomlinson, Chairman of CGA, and Mr. Norman Prendergast, Group Director of the Agriculture and Agro-Industries office of JAMPRO. Mr. Winston S. Gooden, Vice President of Production and Promotion at JAMPRO was also supportive of the mission. It was still unclear at this time whether the two groups could form an effective working relationship.

On return to Kingston Jan 1st 1992. Hopley gained the joint acceptance of Prendergast and Tomlinson of a combined process. Hopley then organised the selection of members of the SMG from within the two organisations, and interviewed all of the participants, with the exception of Mr. Frank Weir, who was drafted to the group at the CGA board meeting on 1/9/92 that approved the adoption of the process.

On Monday 1/20/92 the initial strategic planning meeting was jointly run by the consultants who then spent the rest of the week assisting the eight teams that it was decided were needed to do the staff work to analyze both the external environment facing CGA and its internal strengths and weaknesses. The next step is for the SMG to share this information at their planned retreat on 2/28/92. On 2/29/92 the SMG will then be ready to adopt appropriate corporate, business and functional level strategies to guide the implementation phase.

The process is adapted from several sources, but is close to that outlined in the book, Strategic Management Theory: An Integrated Approach by Charles Hill & Gareth Jones, published in 1989 by Houghton-Mifflin, ISBN 0-395-52369-9.

### 2. Report Organisation

Embedded in this total report is that of Mr. William Ennen, but a stand-alone copy of Ennen's report has also been made available.

Ennen's report covers best the initial assessment and the planning activities during the joint time on site of the two consultants in the week of January 19th-24th. Hopley's report covers the team acceptance and formation activities undertaken partly in November 1991 and mostly between January 1st and 11th 1992, and the philosophy behind and description of the strategic management process.



The recommendations section is the joint work of both consultants.

### 3. The Strategic Management Process

There is ample research now available that demonstrates that those organisations with a formal business planning process outperform those without plans. In particular, if no strategic direction for an enterprise exists there is a strong possibility that individual activities that look beneficial at a particular point in time may become irrelevant and/or wasteful as the situation facing the enterprise changes in predictable ways. Thinking about and planning for the future is common sense. Unfortunately there are many impediments in most normal enterprises, and those that have been declining in long term performance have most of them.

A lean management team often means executives focus entirely on day-to-day operations. Inappropriate past decisions become enshrined in "the way we do things". Shortage of cash limits resources for investment in new products, processes and markets. Overall an enterprise undergoing contraction tends to focus too much on internal issues.

3.1. Any strategic process is only as good as the freedom of the individuals involved. There is a danger in hierarchies that the tough questions do not get asked. This was circumvented by having JAMPRO personnel and CGA board members involved. In this case both required convincing about the good will and competence of the other organisation, so the willingness to ask hard questions of each other was apparent.

3.2. Participants from the board level, or outsiders, may not know enough about the internal operations of the enterprise. This is tackled by having line managers from CGA, JCG and CDC Ltd in the SMG.

3.3. There is a danger of excluding strong internal critics from the process, which undermines the credibility of the results. This was avoided by the inclusion of newer board members with strong opinions about what they would like to see in the future.

3.4. The process must be owned by the enterprise and supported by the outside participants. Four board members each volunteered to take responsibility for running the overall process. Mr. Ken Newman finally got the nod from the SMG. Also all eight topic specific teams were led by CGA, JCG or CDC Ltd. personnel with JAMPRO support as suitable.

3.5. For the decisions to be the best the enterprise is capable of, it is essential that all SMG members be brought to a similar state of understanding at the conclusion of the data gathering and analysis stage. For the later stages of action plan development, communication and implementation all SMG members need to understand the basis on

which choices were made so they genuinely support the direction taken.

3.6. In this particular instance, since there are several thousand interested growers who need to understand and support the future success of CGA and it's subsidiaries, a comprehensive communication process is strongly recommended.

3.7. When the implementation plans are developed it is expected that they will form the basis for a "management by objectives" approach, where each plan objective is owned and delegated either in whole or in part throughout CGA and it's subsidiaries. It must be understood and accepted that this may involve the addition or shifting of resources within the total enterprise.

3.8. Because of the size and importance of CGA and it's role in the Jamaican citrus industry it is likely that benefiting this enterprise will involve serious contribution by the Jamaican public sector. JAMPRO's participation here is expected to be substantive, as well as advisory, and a lot depends upon the involvement of Prendergast, Picart and Mr. Aaron Parke and their ability to influence the rest of JAMPRO and other public bodies. Specifically, additional land and investment money for a core farm may be needed for the enterprise to be able to continue to protect the small grower.

## I. REPORT BY ROBERT HOPLEY

This section chronicles the meetings and other activities of Hopley in November 1991 and the first January 1992 site visit relative to the CGA strategic management intervention. The second January site visit is covered by Ennen.

### 1. November Visit

Although not included in this contract, I was on site in Kingston on the Scott's productivity contract and managed to fit various activities related to the CGA intervention in without detriment to the Scott's intervention.

#### 1.1. Sunday 11/24/91

Discussed outline of plans with Wilson and confirmed that I needed meetings with Tomlinson, Chairman of CGA and Prendergast, Group Director of Agriculture and Agro-industries at JAMPRO, and Mr. Cristian Gillen, Caribbean Regional Director of UNIDO, to discuss the recommended strategic management process. The implications of the recommended process are almost as meaningful for JAMPRO as for CGA.

#### 1.2. Monday 11/25/91

At the 9:00 JAMPRO Scott's briefing I made it clear to both Ms. Valerie Veira, Senior Director of the Technical Assistance, Industry Modernisation and Design Centre and Prendergast that I would be trading a little time between November and January; and explained how I intended meeting the objectives for each intervention. This was cautiously accepted by both.

At 14:00 I had a meeting with Wilson, Goldson and Tomlinson. My chief objectives at this meeting were to:

- identify this effort as a continuation of the initial analysis of Ennen.
- propose a strategic management process for CGA which would involve several members of JAMPRO in addition to CGA participants
- gather additional background information about CGA and its subsidiaries
- establish a good working relationship with Tomlinson
- establish under what conditions Tomlinson would endorse such a proposal

Success was excellent on the first three meeting objectives, satisfactory on the fourth and promising but not conclusive on the last( See Appendix 10 for information on CGA). Tomlinson was skeptical about the motives and abilities of JAMPRO, and I worked to reassure him on these points. However before he would be prepared to forward information to the board, Tomlinson wanted my assurance that I thought key personnel at JAMPRO were really committed. I requested time to talk to JAMPRO personnel and arranged to meet Tomlinson again on Thursday 11/28/91 to report my findings.

#### 1.3. Wednesday 11/27/91

Met with Wilson, Picart and Prendergast at 17:30. My meeting objectives were to:

- explain the planned CGA intervention process completely to the two key potential participants from JAMPRO
- explore what information, beliefs and opinions they had relating to CGA and the development of citrus in Jamaica
- determine who, if anyone, should lead JAMPRO close involvement
- estimate their time available and commitment to play such a role

Results were acceptable on all four objectives. The management capability of CGA was not highly regarded and this had prompted the department to go along with a recommendation assigning considerable land for a western Jamaica citrus integrated enterprise to the Jamaican National Commercial Bank and a Californian citrus producer. Several other opinions on the effectiveness of CGA appeared at odds with the data gathered by Ennen, but recognition of the responsibility and readiness to assist was clearly stated several times by Prendergast. We agreed that leadership of the JAMPRO team had to come from Prendergast's level or above, and Prendergast undertook to arrange a meeting with Mr. Winston S Gooden, Vice President of Production and Promotions at JAMPRO. Time available would depend upon the priority given to this by JAMPRO.

#### 1.4. Thursday 11/28/91

Met alone with Tomlinson at 14:30 with the following objectives:

- report on meeting with Prendergast and my conclusions
- learn more CGA's history and present business
- continue developing an understanding of Tomlinson and his goals for CGA
- explain how additional outside staff resources might be available through UWI and others
- gain acceptance that this was "worth trying"

I quickly explained my points and spent most of the time questioning Tomlinson about CGA. I came away tremendously impressed at Tomlinson's life-long commitment and work on behalf of the small citrus grower. I learned a great deal about CGA and it's history. Tomlinson decided this strategic management process may be what he has been seeking to set CGA on a growth path that would extend beyond his retirement and that he would recommend it to the board.

At 16:00 I met with Gillen face-to-face for the first time, since travelling schedules had previously interfered. Wilson and Mr. Kimmo Kartano UNIDO JPO, were also present. My objectives for the meeting were to:

- explain progress on the Scott's intervention, the primary task of the visit
- discuss next steps at Scotts and the dissemination objective
- outline the CGA process and progress
- establish a good working relationship between us

All of these objectives were satisfied, but doubt was expressed about the potential outcomes of the CGA process. From my perspective the CGA process was going classically well. Many people with doubts about the commitment and competence of the others were nonetheless going ahead. This satisfies the requirement that to be of any use a

strategic intervention has to be the opposite of "easy come, easy go".

At 18:00 I met with Gooden, Prendergast, Veira and Wilson. My objectives were to:

- explain the extensive potential impact of the proposed intervention upon JAMPRO, CGA and many small citrus growers in Jamaica
- gain either Gooden's decision to join the process himself or endorse Prendergast's participation
- express my belief that JAMPRO ought to have resources constantly available on the island to make strategic interventions

These objectives were met and Prendergast's lead role was endorsed. There was some concern about the meeting of the Scott's objectives at the same time, but I did not think this would be a problem.

### 1.5 Activities between visits

Letters were sent to Tomlinson and Prendergast about possible organisational activities in December and some early January meetings, but these turned out to be unrealistic since insufficient understanding and acceptance of the process had been generated in the November trip. I was also informed of the severe cash flow problems at CGA going into the harvest season, and there was some nervousness at JAMPRO and CGA about this being a serious short-term turnaround situation where it might be impossible to focus energy on the long haul.

### 2 First January Visit

Hopley arrived in Kingston on January 1st 1992 and had a variety of meetings between then and January 11th 1992. The main objectives for the two January visits were to get the process started, form the SMG, conduct the first SMG session and set up the internal and external research teams. All of this was achieved with the additional bonus that the teams all completed work plans by January 24th. This section outlines the objectives and results of the meetings in the first January visit. Goldson and Picart assisted with all arrangements for the first two days until Wilson returned from vacation on the fifth of January.

Meetings in the second half of January are best covered in Ennen's report.

#### 2.1 Thursday 1/2/92

At 10:00 I met with Tomlinson, Prendergast, Picart and Goldson at the Kingston headquarters of CGA. My meeting objectives were:

- to have both Tomlinson and Prendergast express to each other the support within their organisations for this joint planning process
- to decide to proceed as recommended
- to outline the team formation process
- to gain input on team membership and to raise the team leadership issue
- to continue to build my base of knowledge about CGA and JAMPRO

All meeting objectives were met. The critical issue concerning recent past relationships between the two organisations came clearly

into the open and was dealt with satisfactorily. Until this issue was dispensed with there really had not been an agreement to proceed. A meeting on January 9th between members of JAMPRO and the full board of CGA was scheduled. JAMPRO was to make a presentation about past relationships and the present proposal, assisted by Hopley. Also Tomlinson and Prendergast undertook to schedule certain meetings for me with possible team members in the following week.

At 16:00 met with Gillen and Kartano to discuss with them the activities for January regarding both Scotts and CGA. My meeting objectives were to:

- outline planned January activities for both myself and Ennen
- understand the priorities placed by Gillen on these activities
- further explore the UNIDO philosophy behind development

All meeting objectives were met, but it was apparent that there remained some skepticism about the ability of CGA and JAMPRO to substantially reverse the long term underlying downward trend to the Jamaican citrus industry.

## 2.2 Friday 1/3/92

At 8:00 met with Dr. Mark Smith at the Kingston USAID offices. My meeting objectives were to:

- describe the CGA process
- discuss possible USAID involvement and funding that may be available for the external research teams

It was confirmed that US law currently discourages assistance to non-US citrus activities, although some flexibility may exist in diversification projects, such as guava or passion fruit. Information was also provided about other agencies and contacts. Subsequently the pace of events in the process has prevented further moves towards seeking outside assistance, but this needs to be reconsidered during the implementation stage in primary product, process, market or packaging research & development.

At 9:30 Picart and I met with Mr. Desmond Duval, Marketing Director for both JCG and CDC Ltd. at the Newport West distribution facility. At 10:15 we were joined by Mr. Kenneth Garfield, the newly appointed general manager of CDC Ltd and it's factory at May Pen. My meeting objectives were to:

- understand the situation of CGA, JCG and CDC Ltd from the perspectives of two senior executives
- explain the process and role of the SMG
- gain their support for the process
- invite them to be members of the SMG
- build relationships between all attendees
- state the goal of having CGA board acceptance of the process and endorsement of the SMG members at the 1/9/92 meeting
- give copies of the first two chapters of the Hill & Jones material

All objectives were met and a great deal of information and insight about the potential for the dairy side of CDC Ltd's operations was provided. Both executives had previous experience with strategic planning at other organisations and were enthusiastic about joining the effort.

At 15:30 Picart and I met at the Bog Walk factory of JCG with Mr. Victor Nugent, Group General Manager for JCG and CDC Ltd and the presently inactive Caribbean Preserving Co., and Mr. C. V. Bent, Vice Chairman of CGA. My initial meeting objectives were the same as at the meeting with Duval/Garfield. This was a critical meeting since there was widespread concern about the extent of cooperation that would be forthcoming from Nugent as he is the senior operating officer. After carefully listening to my presentation, Nugent then made it clear that he was eager to support the process as it would provide him improved direction for his "management by objectives" program.

Additional objectives were to:

- tour the factory
- discuss issue of appropriate leadership for this process

Both of these objectives were achieved and Bent volunteered to discuss the process leadership issue with the other CGA board members who agreed to serve on the SMG.

### 2.3 Sunday 1/5/92

Met with Wilson at 11:00 to outline progress made and to discuss objectives and scheduling for the following week. Continued discussions about the composition of project teams that would be needed in late January through March.

### 2.4 Tuesday 1/7/92

At 8:00 met with Prendergast and Dr. Ian Whittaker, an at-large board member of CGA, with the general objectives expressed for the Duval/Garfield meeting above and also to explore Whittaker's readiness to act as the SMG leader. The meeting was generally successful but there may be some conflicts between Whittaker's consulting activities and the leadership assignment.

### 2.5 Wednesday 1/8/92

At 12:00 met at the Jobson farm in Linstead with Mrs Scharlie Jobson, a relatively new CGA board member, and Wilson. This meeting was scheduled as the result of the remarks of several CGA and JAMPRO personnel relating to the probing questions Jobson had been asking of CGA at recent board meetings. The objectives for the meeting were as for the Duval/Garfield meeting with the added objective of considering Jobson for the potential process leadership assignment.

All objectives were fully met, with Jobson agreeing to serve on the SMG if requested at the next day's board meeting. Unfortunately a blocked road when leaving the farm delayed us sufficiently so that a 15:00 scheduled meeting at Bog Walk with Mr. Kenneth Newman, another CGA board member, was missed.

### 2.6 Thursday 1/9/92

Attended the board meeting of CGA at Bog Walk at 14:30 to support Prendergast's presentation concerning JAMPRO's intentions. Goldson, Picart and Wilson from JAMPRO were also in attendance. Jobson asked the point-blank question about the western citrus issue and this was discussed and agreement reached "to bury the hatchet". I then presented with the following objectives:

- to describe the strategic management process to the complete board
  - to gain approval of the CGA board to conduct the process
  - to select and approve the SMG membership
  - to schedule the first strategic management session
  - to distribute "homework" questions and chapters
- 3/4 of Hill & Jones
- to agree that ownership of the process had to reside within CGA
  - to gather further data on the SMG leadership issue

The meeting went extremely well, characterised by candid and knowledgeable discussion on all matters raised. A great deal of new information was shared with contributions coming from all sides. Monday January 20th was set aside for the first session. Mr. Frank Weir was persuaded by other board members to join the process because of his extensive financial experience. A gap in SMG knowledge of dairy matters was recognized. The homework questions immediately began to stimulate thoughts about the situation facing CGA. It was agreed that Hopley would recommend to Tomlinson on the SMG leadership issue after meeting with Mr. Kenneth Newman, who had been unable to attend the board meeting, the following day. All four board members involved had agreed to this process.

This meeting continued the perfect "copybook" nature of this process.

#### 2.7 Friday 1/10/92

Met at 10:00 at Bog Walk with Bent, Wilson and two field officers of CGA. This meeting had been requested by Wilson and I attended to build my knowledge about CGA. I was surprised that the field outreach efforts were so small, having appreciably declined in recent years. This was now more of a problem because of a resurgence of interest in citrus growing evidenced after the 1988 Hurricane Gilbert, which devastated many other crops, but left citrus relatively unscathed. The extensive information shared here was to be fed into the field outreach project team to be formed after the first SMG meeting.

At 13:00 finally managed to meet with Newman and Wilson with the same objectives as the Duval/Garfield somewhat modified by the boards decision the previous day. Objectives were met and I decided to recommend Newman to Tomlinson as the SMG leader. All board members would have been able to do the task, but the difficult final decision was influenced by Whittaker's consultant role, Bent's vice chairmanship and perceived closeness to Tomlinson, and Jobson's remote location and difficult communication links.

At 16:00 I debriefed with Gillen, Wilson and Kartano where the progress of both the Scott's and CGA projects was discussed and Gillen requested that an invitation for him and Kartano to attend the 1/20/92 meeting be obtained. This was later done.



## II. REPORT BY WILLIAM ENNEN

### ABSTRACT

#### Objective:

In coordination with a Professor Robert Hopley, assist the Agro-Food Processing Unit staff within Jamaica Promotions (JAMPRO). JAMPRO, the primary economic development agency in Jamaica, is responsible for providing a broad array of assistance to Jamaican business and industry. Professor Hopley and I provided expertise in management, planning and productivity to JAMPRO in general, and Citrus Growers' Association (CGA) specifically.

#### Duration:

18 day split mission: 7 days Jamaica (9/28/91 to 10/5/91); 3 days U.S.A. (Oct/Nov '91); 6 days Jamaica (1/19/92 to 1/24/92); 2 days USA (Jan/Feb '92)

#### Project Description:

The goal of this consulting intervention is to advise/assist UNIDO/JAMPRO to enhance the export capability of the Jamaican citrus industry. The object of the September site visit was to conduct an assessment of CGA, (a complex organization representing 10,000 growers and operating various processing facilities) especially its ability to provide the leadership and management required to compete more effectively in world markets, and to assess JAMPRO's capability to act as resource to CGA through an Agro-Food Processing Unit. The resulting data and recommendations gathered from the site visit have been utilized by Professor Robert Hopley, the lead consultant, and myself, to design and deliver on-site assistance in strategic planning.

#### Interim Conclusions and Recommendations:

Interviews throughout the private and public sector, the review of a wide variety of documents, and site visits to citrus processing facilities suggested that the expansion of domestic production for export markets would require new leadership from both the private and public sector in order to overcome a wide range of obstacles to effective exporting. Increased access to significant export markets (e.g., EEC) will require the development and application of public sector expertise to private sector experience in food production and processing. Subjects like regulatory compliance (e.g., ISO standards), packaging, marketing and processing are all important to effective export programs. These dynamic topics require a diverse set of skills and expertise, suggesting that comprehensive management and planning will be critical to this development effort.

It was my finding that between the public and private sector there exists the aptitude and interest to compete effectively, but that there is insufficient coordination across the two domains. Therefore, it was recommended that a joint strategic planning process, between JAMPRO and CGA, be designed and implemented commencing with the November 1991 visit of Professor Robert Hopley to Kingston, Jamaica. It is intended that this recommendation lead to a completely different working relationship between the public and private sector such that each party realizes their particular role with regard to the common goal, and that it become second nature that each should be involved in the other's planning and resource allocation processes.

Final Outcomes and Concluding Observations:

My responsibility in the second half of this split mission was to assist Professor Robert Hopley with the CGA strategic planning meetings in which JAMPRO representatives were active members. In addition, I delivered a two hour seminar at JAMPRO headquarters titled: "Organization of Small Firms for Sector Improvement."

All aspects of the planning process were fully engaged. Innovative leadership and facilitation aspects were implemented and coordinated. Upon departure we could point to: having initiated a strategic planning process for CGA, a process in which JAMPRO is an active participant; having achieved consensus that a two day retreat be convened within six weeks; having initiated and delegated assignments to eight topic specific teams, having every team hold initial meetings to develop work plans; and, arranged to have Professor Hopley return to assist at the retreat at the shared expense of CGA and JAMPRO.

There was active agreement among all parties to the process (CGA board members, employees and JAMPRO participants) that the recommendations and implementation efforts successfully initiated a strategic planning process for CGA and, more importantly in some respects, formed a new working partnership between the respective public sector and private sector organizations.

## INTRODUCTION

This is the final report of William Ennen, University of Massachusetts, Donahue Institute working in coordination with Professor Robert Hopley, Hopley and Associates. This report covers all activities related to an eighteen day split mission in Kingston, Jamaica. My first day of on-site consulting commenced on October 5, 1991. My second on-site visit began on 1/19/92.

All consulting efforts have been provided in conjunction with Professor Robert Hopley the lead consultant in this effort.

The development and application of public sector business expertise to private sector settings has become a common aspect of economic development. Typically this assistance has been focused on large and medium sized businesses because organizations of this size often mirror the bureaucracy which is providing the service. Professor Hopley and I frequently work together on the application of specialized expertise to medium and small sized firms which rarely benefit from such assistance. While Professor Hopley focuses attention on manufacturing management, I spend more time evaluating management strengths and weaknesses within and across the public and private sectors. Subsequently, while Professor Hopley's recommendations often focus on the firm or part of the firm, I will focus on a firm, an industry sector or a related public sector agency.

The general goal of this mission is to induce greater export activity from the Jamaican citrus industry by focusing public resources on private enterprises. A concerted effort has been made to establish food production, processing and export expertise within JAMPRO, the Jamaican government's principal economic development agency. Mr. John Wilson, a experienced agro-food engineer, posted to JAMPRO by UNIDO/UNDP, has been assisting with the development of "in house" food processing and packaging expertise. Professor Hopley, an expert in industrial management, was retained to advise on improving productivity at the factory level. In assisting Professor Hopley, I have focused on: 1.) assessing the "readiness" of the private sector to pursue new markets; 2.) assessing the ability of the public sector to service these private sector efforts; 3.) making recommendations to Professor Hopley for a strategic planning intervention; 4.) assisting Professor Hopley in the planning, delivery and management of the actual planning sessions; and, 4.) delivering a seminar at JAMPRO offices on the utilization of sector specific strategies for economic development.

Mr. Wilson has provided integral coordination and background information throughout all of my efforts.

Annex II to this report is a list of reports utilized throughout this mission. Many of these reports were of a technical nature and as such were not immediately applicable to my efforts. Nonetheless, each one was distinctly useful.

During the first half of the split mission I collected data and observations, and to made

recommendations to Professor Hopley in preparation for his follow up visits in November 1991 and January 1992. During the second site visit I assisted Professor Hopley with all aspects (i.e., design, facilitation, follow up coordination) of the planning process, with a special emphasis on assisting teams after the first full planning session.

Upon return from the first visit to Jamaica I met four times with Professor Hopley to discuss the project. Various draft documents were provided to Professor Hopley over the course of these meetings. A preliminary report, dated 11/16/91, was provided to Mr. Christian Gillen, UNIDO Country Director, Jamaica prior to Professor Hopley's departure for Jamaica in late November. A full interim report was hand delivered to Mr. Gillen upon my arrival in Kingston on January 19, 1992.

It is my firm conviction that the underlying intentions and objectives of these consulting efforts were fully realized. CGA is well along in establishing a strategic business plan that will significantly enhance CGA's historic role as a producer cooperative while enabling the organization to pursue new business strategies. JAMPRO representatives make up fully one third of the CGA strategic planning group, providing government direct access to assisting economic development by servicing a private sector entity. Finally, the full participation of the JAMPRO representatives throughout the assessment, planning and delivery stages has allowed the consulting effort to combine direct service with staff training.

## I. ASSESSMENT ACTIVITIES: FIRST HALF OF SPLIT MISSION

### A. Pre-departure Planning

During a series of meetings in August and September, one which included Mr. Wilson who was visiting the U.S.A., Professor Hopley and I clarified what I should focus on during my upcoming visit. By the time I departed for Jamaica the private sector client base upon which my data gathering would be focused was narrowed down to one major growers' association, CGA, and one subsidiary processing facility, JCG. Additionally CGA did complete a "Needs Assessment" document (see Annex III for a blank sample of one component in the assessment process) a tool Professor Hopley and I have utilized frequently in the U.S.A. This document, a gap analysis view of an organization by functions, allows us to understand how senior managers perceive their organization's strengths and weaknesses.

### B. Briefing

I was briefed on Sunday, September 29, by Mr. Wilson. At that time he provided me with several reports and we discussed the intentions of UNIDO and JAMPRO in great detail. It became apparent at this time that I would be expected to go beyond the data gathering responsibility and should be prepared to discuss what Professor Hopley might initiate during his November visit. This change of expectations seemed related to the recent liberalization of currency which was having a dramatic effect on Jamaica's economy. With currency controls in abatement, there was growing discussion that Jamaica needed to become much more active in every possible international market as a way to earn hard currency. Without hard currency it would be prohibitively expensive for Jamaican business and industry to acquire new technology and capital equipment.

### C. Interviewing

The principal activity of this visit was to conduct interviews, formal meetings and informal discussions with a broad variety of individuals from both the public and private sectors. From this kind of activity I would learn about perceptions regarding roles, abilities, skills, responsibilities, attitudes and intentions. The interviews commenced on Monday with extensive discussions at JAMPRO. The middle three days of the week were spent conducting site visits to CGA headquarters in addition to processing facilities at Bog Walk and May Pen. Friday was spent documenting and discussing the results of the week. This trip was brought to a close on Friday evening with a debriefing session at JAMPRO.

Each day was filled with one-on-one or group interviews/discussions. During interviews with public sector representatives I worked to understand each individual's function, perspective, special skill area, and individual style as it might relate to contact with customers. With private

sector representatives, I worked to understand their particular role in the specific business, their managerial style, their awareness of or interest in assistance from the public sector, and what they perceived to be the strengths and weaknesses of their organization. While the collection of facts or descriptions is an important aspect of this work, I am as much interested in identifying those individuals, in either sector, that have the will and the ability to use all available resources in an effort to improve economic activity.

#### D. De-briefing

Friday, October 4, the evening prior to my departure, I participated in a debriefing session at JAMPRO headquarters. The following observations pertain:

1. My contact with the CGA Board of Directors along with other recent events encouraged an intriguing discussion regarding the role of JAMPRO/government in influencing the growth of the Jamaican citrus industry. Extensive details were discussed regarding recent purchases of real estate and processing facilities.
2. I reviewed four areas of project interest that I would report back to my colleague: 1.) plant level improvement projects in productivity, scheduling, quality, and efficiency; 2.) new product development between the private and public sectors; 3.) new venture development between the public and private sectors; and 4.) general training seminars.
3. I posed the following question: should/could we as consultants, develop a joint CGA and JAMPRO planning process to achieve the following goals: develop a future orientation for CGA to compliment the current development of the processing facilities without ignoring the needs of small growers; bring the new managerial talent from JCG together with the expertise within JAMPRO for product and market development; improve the working relationships between the CGA board and the senior managers at JAMPRO; and, use the entire setting to further introduce concepts of delegation, teamwork, planning, and role definition.

I closed my portion of the briefing by pointing out that my role had been to collect data and make recommendations to Professor Hopley for his November trip. In this regard I would probably be recommending that CGA and JAMPRO participate in a joint planning session. There was general agreement that this choice, regardless of our recommendations, must be carefully considered by senior managers within JAMPRO.

## II. OBSERVATIONS AND RECOMMENDATIONS: FIRST HALF OF THE SPLIT MISSION

For the purposes of this interim report I will make general observations about each sector. I should like to note, as a professional who focuses a great deal of attention on the combination of economic development and management consulting, I was not surprised by what I found, nor should my observations be construed as overtly critical. I found the perceptions, behaviors and inclinations of professionals in JAMPRO and CGA to be very similar to that encountered in the U.S.A. on a daily basis. My specialty is to help organizations, be they public or private, bridge functional gaps in knowledge and talent through the utilization of each others resources.

My single most significant observation is that JAMPRO and CGA/JCG have limited knowledge of each other. In effect one of the best outcomes of my needing to interview representatives from the private sector was that it enabled JAMPRO to be seen in an active outreach effort.

### A. Observations at JAMPRO

1. As a group they demonstrated a clear commitment to and interest in their roles as agents for economic development.
2. Many individuals exhibited frustration/impatience with what they felt was a lack of enthusiasm on the part of the private sector to invest in the development of new markets, in the utilization of new technologies, and in the implementation of new management practices.
3. Several individuals suffered from a chronic overload of responsibilities, desiring more definition regarding what their prime responsibilities should be.
4. The number and diversity of customers for JAMPRO's services made some wonder why CGA was being singled out for attention which raised the question: should JAMPRO be "picking winners" or should it provide a broader service to business and industry? This is a very difficult aspect of economic development: given the limitations of resources, should the public sector select focal points for investment or strive to be equitable in the delivery of resources? For many in JAMPRO the focus of services on CGA highlights this question. Should JAMPRO assist a historic, but unwieldy growers' association of 10,000 members, or should it invest the public dollar in more narrowly defined, private business interests that have a much higher likelihood of demonstrating a financial gain?
5. While JAMPRO is the lead economic development agency it became clear that the Jamaican government supports an array of quasi-government agencies designed to accelerate economic growth. There was little evidence at the staff level that these various agencies can operate in an integrated manner with respect to specific customers in the private sector. This is not surprising. Most

bureaucracies have such intense internal politics and survival issues that they rarely find the vehicles for cross-agency efforts.

### B. Observations at CGA/ICG

During my contact with the private sector, all of which was conducted in their offices and facilities, I conducted/participated in many interviews, one extensive facilities tour, and one CGA Board of Directors meeting. CGA and its subsidiary operations present a tangled web. On one hand you have a democratically organized growers' association where anyone with a few trees can become a member and have a vote. On the other hand CGA controls active citrus and dairy processing facilities that operate in an increasingly market oriented manner. The reader should understand that the Board of CGA is the dominant owner of the related processing facilities. To fully understand the relationship between the organizations would require a detailed examination of ownership and a careful review of how CGA rewards growers. The processor, through CGA, provides retroactive bonuses to the individual grower through a re-evaluation of prices paid for fruit. Throughout my involvement with this project I have been amazed and amused as individuals from both the private and public sector have attempted to explain where the benevolent association leaves off and the market responsive processor takes over. Somewhere within the CGA Board of Directors resides an instinctual ability keep the two separate.

The following are my prominent observations about the private sector:

1. CGA is demonstrating clear progress in organizing the processing facilities towards a market responsive philosophy (i.e., the processors view of customers). This is true principally for domestic production, but the talent can be applied to export production. The evidence for this exists in efforts being expended to graphically represent decision making processes and production paths. While the effort seemed quite recent, it was clear that these efforts were leading to the recognition that many functional gaps in management and engineering existed.
2. The CGA subsidiary processing facility, JCG, exemplified the changing approach to management within CGA. This business entity, consisting of three processing facilities, is being run independently, with some arrangement for a direct return of profits for reinvestment into the firm. In addition, hiring efforts are bringing in aggressive business people which is best exemplified by the JCG's general manager.
3. An extensive plant tour of the May Pen facility revealed numerous examples where productivity and quality projects could be implemented utilizing the skills found in the quasi-government agencies. In addition, the production manager at May Pen revealed a keen appreciation for product development from a processing point of view which should be carefully matched, in a peer relationship, to the growing marketing expertise within JCG.



4. Attitudes among managers about working more closely with the public sector ranged from positive to extremely skeptical. Clearly JAMPRO must prove its capabilities to key managers by carefully selecting projects and committing the necessary resources. Packaging and transportation represent excellent project areas where JAMPRO's access to other expertise within government could directly assist JCG (e.g.'s storage of oil concentrate, analysis of alternatives to packaging of the "Crush" product). It should be noted that the best place to view the fragmentation of the quasi-government agencies is from the desk at a processing facility. There have been rumors about the existence of government expertise in such issues as quality standards, but they probably haven't materialized at the small and medium processing facilities.

5. I could find no evidence that CGA was applying the kind of management improvement effort to CGA that is being applied to JCG, its subsidiary. CGA, the representative of individual growers on the critical issue of "price per box" for fruit, is also the purchaser of that fruit (not exclusive) as the principal owner of processing facilities. CGA Board members reported that every attempt to apply improved business practices within the Growers' Association had ended in failure. This is an extremely critical issue for the Association (which effectively acts as a cooperative wholesaler) because private interests vie to develop new tracts of orchards, threatening to supplant the traditional growers with a more carefully orchestrated relationship between growing and processing. These new entities are also utilizing new packaging technologies which will make their products more attractive to export customers.

6. At both the board and management levels there was curious interest in the idea of joint ventures on new products/markets. The ability of government to control the opening of land for agro-business necessitates this curiosity.

7. There was an acute recognition within CGA that export business would be the primary means to earning hard capital which had now become critical to any reinvestment/development strategies.

### C. Recommendations

Recommendations resulting from the assessment efforts conducted during the first half of the split mission are found in Annex IV as provided to UNIDO during November of 1991.

### III. IMPLEMENTATION ACTIVITIES: SECOND HALF OF THE SPLIT MISSION

#### A. Briefing and Design for Strategic Planning

Immediately prior to my arrival in Kingston for the second half of the mission Professor Hopley had been working with representatives from JAMPRO and CGA to lay the foundation for strategic planning. Upon my arrival the two critical tasks were: one, to get a full briefing regarding those efforts; and, two, to design the first meeting of the CGA Strategic Management Group (SMG) which would be held at the JCG, Bog Walk processing facility.

The briefing was accomplished throughout the course of Sunday, January 19, 1991. Professor Hopley and I spent the bulk of the day reviewing his efforts and incorporating the results of those efforts into the half day program design for the first meeting. For example, Professor Hopley was able to work with the CGA board chair to designate someone else from the CGA board to be the SMG chair. Crossing this juncture achieved the following: the CGA board chair would be more effective as a final arbitrator rather than as the chair of the planning process; the appointed chair had demonstrated a respectful enthusiasm and aptitude for leadership; the appointed SMG chair provided us the opportunity to encourage the idea that a new generation of CGA leadership be nurtured; and, the SMG chair, Mr. Kenneth Newman, is respected within the group as both a thoughtful board member and as a "hands on" manager. At the conclusion of the day's work we had a thorough meeting design and a clear understanding of our expectations for the group discussion and the follow up team efforts.

Briefing and design efforts culminated on Sunday evening with a lengthy meeting between John Wilson, Cristian Gillen, Professor Hopley and myself. Our principle concern was to provide Mr. Wilson and Mr. Gillen a clear understanding of what would occur and what we might expect for the rest of the week. Also, we were able to use this as an opportunity to clarify various assumptions, a prominent one being that our efforts needed to stimulate creative thinking within the CGA board about equitably distributing the financial rewards derived from CGA and its subsidiaries.

## B. First Strategic Planning Meeting

The strategic planning process was fully initiated with the first meeting of the CGA Strategic Management Group on 1/20/91 at the Bog Walk processing facilities of JCG Ltd., a subsidiary of CGA. The meeting began at 10:25 a.m. and ended at 16:00. Sixteen people participated in the meeting. The makeup of this group included five CGA board members, three employees of CGA subsidiaries, four representatives from JAMPRO, two guests from UNIDO (participants in the late afternoon), and the two consultants. A list of those attending can be found in Annex V. The meeting was lead by Professor Hopley on behalf of the SMG Chair, Mr. Newman. The meeting proceeded through the following stages which was consistent with our planning.

\*introductions

\*reflections from participants on two questions: what personal strength do you bring to this strategic planning process; and, what particularly interested you in doing the homework for this session

\*review of homework

\*break, 11:22 to 11:37

\*continued review of homework

\*lunch, 13:15 to 13:57

\*continued review of homework; transition to review of the business environment for various products and processes

\*team assignments; closure issues, 15:19

\*handouts of reading assignments and meeting closure, 15:53

Two objectives were achieved in reviewing the initial questions. First, the questions set the expectation that we needed to hear from all members of the SMG. Based upon past meetings we were concerned that some board and staff representatives would withhold comment in deference to the CGA board chair or the JCG group general manager. Both Professor Hopley and I were very satisfied with the distribution and frequency of participation during the day. Second, the question regarding personal strengths challenges each individual to recognize how they can add to, rather than detract from the process.

The homework included reading assignments about strategic planning and questions which would make the reading applicable to CGA planning. The discussion of the homework, upon which so much time was spent, provided the framework for productively discussing issues related to defining the mission and goals for CGA. And, at least as importantly, the homework questions allowed Professor Hopley to initiate the limited discussion of important business issues (e.g., why did CGA purchase the May Pen facility and what does that suggest for future business strategies). This long, sometimes rambling discussion was the very feature of this meeting that allowed important views to be stated in a productive manner, a characteristic of the best type of

brainstorming. This was exemplified at several points in the meeting when new board members were able to respectfully raise difficult questions about the distribution of profits and management of finances, all done in front of public sector representatives. The discussion of the homework questions allowed many individuals to raise questions or to express a view without generating unnecessary confrontations.

Closure to this meeting was accomplished by finalizing two questions. First, the assignment of topic specific teams (eight of them) which would be responsible for: providing the SMG chair with team work plan in five days; gathering and evaluating relevant information; and, coming to the proposed SMG retreat prepared to educate the entire group as well as make recommendations. Second, the group decided to accelerate the original timetable, setting expectations that the entire group would reconvene for a two day retreat beginning on 2/28/92.

The formation of the topic specific teams was carefully coordinated before, during and following the first planning session. Professor Hopley strove to have each team lead by either a CGA board or staff member while matchmaking the proper JAMPRO representative to the team. This effort alone took considerable time and assertiveness as it often required involving someone who had no previous connection to the process.

### C. Team Meetings

With the planning process initiated it was now necessary to ensure that each team met, understood their responsibility, and developed a work plan prior to our departure at the end of the week. Each of these work plans was to be delivered to the SMG chair, Mr Newman.

Between Tuesday and Friday I met with six of the eight teams to facilitate their efforts. These meetings took place in a variety of locations. Each team enthusiastically addressed the task. Each of the groups needed considerable assistance as they were inclined to skip over two important steps. First, they tended to confuse developing a work plan with starting the actual work. Second, they didn't understand the importance of fulfilling the information gathering, analysis and reporting steps. The responsibility at hand was to develop a work plan, set dates for future meetings, sort out information gathering assignments, and begin planning how the team would educate the SMG at the end of February. The same message had to be delivered to each team: you can make recommendations at the retreat, but your most important responsibility is to provide a thoughtful overview of the issue; thereby, everyone at the retreat would be fully able to participate in decision making. The tendency in all of the teams was to rush into the decision making stage, but this was avoided.

A good example of a team meeting and the uniqueness of this process was the Field Outreach

team meeting held at Mr. C.V. Bent's home. The participants included two board members, one JAMPRO official, one JAMPRO/UNIDO official and myself. The meeting lasted approximately three hours. Mr. Bent, an agronomist of some fame in Jamaica and the team leader, had prepared a thorough outline field outreach efforts, past and present. During this discussion it became apparent that Mr. Bent and Mrs. Jobson, a grower and new CGA board member, would find a common interest in resuscitating the field service outreach system for growers through the strategic planning process. In addition, Mr. Bent was giving the public sector representatives a rare glimpse of how the field service outreach system works in coordination with the CGA representative system. We were able to close the meeting with expectations of how this information would be captured, what information needed to be gathered between the next two meetings, and how important ideas and recommendations would be collected and brought to the retreat. As an outsider I could sense that this meeting opened new lines of communication within the CGA board and between a senior JAMPRO official and the CGA board. It will be very important for JAMPRO to fulfill its obligation, made at this meeting, to capture, consolidate and return the details of these discussions back to the full group.

Immediately prior to my departure I provided Mr. Newman a full accounting of the teams, their members and some recommendations. All of the teams were operating, and I was quite impressed with how much time CGA/JCG representatives were devoting to the process especially given that citrus harvest was in full swing.

#### D. Seminar

At the University of Massachusetts, Donahue Institute I frequently work with industry sectors and small manufacturers in particular. Prior to my return trip JAMPRO and UNIDO officials requested that I offer a seminar about my experiences in coordinating public sector resources to meet private sector needs. The seminar was titled: "Organization of Small Firms for Sector Improvement".

The seminar, sponsored by the Agro-Industries Division, was held in JAMPRO offices on Thursday, January 23 from 17:30 to 19:30. Outreach for the program was done by JAMPRO staff members. Of an expected twenty-one people there were fifteen attenders. Almost all of these people were from the public sector agencies (e.g. Bureau of Standards, JAMPRO, PIOJ). The program went for the full two hours and many guests remained afterwards to discuss specific issues. Throughout the program I utilized many current examples from my efforts in Massachusetts.

With all of my examples (e.g. plastics and paper industries in particular) I hoped to impress upon the audience that I organize the private sector in order to organize and focus the resources of the public sector. In addition I used examples to outline the various roles I fulfill in these efforts including management consultant, broker of consulting services and economic development agent. This is a unique situation as I am a representative of the University of Massachusetts, but I utilize a broad

cross section of colleges, universities, institutions and individuals to address the needs of businesses. Coordination and matchmaking such as this is one effective response to making the best use of limited public funds.

As a closing note on this topic I will point out a clear parallel between public sector thinking in Massachusetts and Jamaica. In both places the public sector seems to develop services for the private sector and then seek private sector involvement. Seminars, workshops and surveys come to the private sector as fait accompli. Advances in systems management, the concept of flexible specialization, and demands for improved service and product quality have forced the private sector, especially small firms, to select a customer niche, understand the customers priorities, and address these needs in a proactive manner rather than herd the customers towards what the producer wishes to sell. The public sector in both locations needs to remain alert to these issues and other issues, developing interactive partnerships that constantly refine/improve the service of government.

#### IV. CONCLUDING OBSERVATIONS

This third party intervention to bring a complex, private sector entity into a strategic planning process with full participation by representatives from the public sector has been fully realized. Certainly I can imagine skepticism about participant commitment when the consultants are gone. And, I have serious doubts about whether public sector representatives can keep the bureaucracy focused on the task at hand. Yet, in reviewing the November recommendation (see Annex IV), it is clear that we have addressed and met the expectations set forth at that time. In concluding I would like to review several key aspects of this effort.

The November recommendation differentiated between strategies which enhanced the effectiveness of the firm or strategies which enhanced the capacity of the sector. The recommendation proposed a strategic intervention which would fundamentally reshape available resources. The key to achieving this recommendation and its subsequent long term benefits was to breakdown and re-configure communications between the public and private sector.

Two things occurred within days of the initial SMG session symbolizing this effort. First, the marketing topic team, lead by a JCG employee, met at JAMPRO with an expanded membership from the JAMPRO organization. Second, JAMPRO employees who had not previously participated, joined the finance and administration team. This recruitment of talent from the organization and the willingness of the private sector to welcome the public sector participation exemplifies the kind of working relationships that we intended to develop through our efforts.

Although we were unable to proceed according to the November timetable, SMG participants deserve credit for putting us back on schedule. JAMPRO/UNIDO requested changes to Professor Hopley's schedule in November and December caused a delay, but once the parties agreed to the process all lost time was made up. By setting a retreat in late February the SMG has bested our expectations.

In this process where one group, the SMG, delegates assignments to semi-autonomous teams we can recognize one of the best attributes of effective planning design. Appropriate control has been preserved for the SMG chair and the CGA board while the topic specific teams proceed. At both levels of operation, the SMG and the teams, careful matchmaking of talent to topic and broad representation have been assured. The outcomes will include: a strategic plan for CGA, a focusing of existing public sector programs to be utilized for specific needs, the exploration of a new model for public-private sector relations, and the active participation by all parties in many aspects of the consulting assistance.

Many questions can be asked to test value of this intervention: will the strategic planning process actually help CGA address many of the business and organizational hurdles which it faces;

will politics and the whims of bureaucracy undermine effective public sector participation; can the public sector adopt these techniques and strategies and apply them to other economic development efforts; will this process help Jamaica work towards achieving the proper balance between export production and domestic production; etc ...? For me, the most appropriate test would be for UNIDO representatives to interview SMG participants one year hence in order to determine the strengths and weaknesses of this novel effort.



### III. RECOMMENDATIONS

#### 1. CGA recommendations

Some recommendations for consideration at the next stage of the process, namely selecting a mission statement, corporate and business level strategies and functional strategies have been conveyed to Mr. Kenneth Newman.

##### 1.1

Complete this difficult initial process deliberately with patience and understanding of everyone's need to understand the data before jumping to decisions. Over-hasty strategic management processes result in the kind of lack of understanding and opposition that has met the CG's internal capital raising efforts in the past.

##### 1.2

Recognise the extensive need to communicate some of the results of this process to the major stakeholders such as, the citrus growers at the district and branch levels, dairy farmers, the various departments of the Jamaican government, potential on- and off-island investment sources and the Jamaican general public. This communication program should include consideration of the development of a videotape and the public media.

##### 1.3

Develop at least four support action plans, one each for CGA, JCG, CDC Ltd. and the distribution/marketing functions. These should be comprehensive and the foundation of an MBO process, whereby every objective is delegated either in whole or in part to a particular individual.

##### 1.4

Use JAMPRO and UWI resources to tap into funding for any comprehensive research studies needed in identified areas where new information needs to be generated.

##### 1.5

The process will need to be less comprehensive in future years as this initial base is expanded upon. Nevertheless it is advisable to run the process annually but change the timing to April through June to avoid the busy citrus season.

#### 2. JAMPRO recommendations

The capability to conduct this kind of strategic management intervention should exist and be active in Jamaica as part of the economic development activity at the sector and enterprise level.

We recommend that JAMPRO is a logical place to develop this capacity, and that a well-developed strategic direction should be a basic pre-requisite for significant government assistance of any kind.

This has been verbally recommended to Prendergast, Veira, Gooden, Wilson and Mr. Ambrose E. DaCosta, Senior Group Director of the Economics and Incentives Division of JAMPRO. To Dr. Arnaldo K. Ventura, National Advisor on Science and Technology in the Ministry of Development and to Gillen of UNIDO/UNDP. This could be achieved by either of the three recommendations below, or combinations thereof.

### 2.1 Off-Island Training

Select appropriate personnel to spend time studying both theory and practice with the American Management Association and a strategic consulting firm.

### 2.2 Develop UWI and JAMPRO partnership

Dr. Norman Gurvan and Dr. Gordon Shirley have both expressed interest in developing some of their senior students and faculty to participate in learning to run strategic management processes.

### 2.3 Use consultant to train

Engage a consultant with the responsibility to train selected JAMPRO personnel both theoretically and experientially in concert with island sector organisations or enterprises.

### 3-UNIDO recommendation

The consultants believe that a significant part of the success of this intervention was due to the protracted time used by the split mission and shared roles they played. This allowed the participants at CGA and JAMPRO to come at their own pace to accept the sound reasons for the strategic management process. From August 1991 to January 1992 is not at all an uncommon amount of time for people to take to decide to undertake such a fundamental reappraisal of their business. Progress during January and February has been unusually quick and thorough.



UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION

JOB DESCRIPTION

October 1991

**JOB DESCRIPTION**

DP|JAM|88|009|11-56 and 11-57|J 13103

<b>Post title</b>	Specialists in industrial organization and systems of production
<b>Duration</b>	( 0.6 man-months (18 days) - split missions as follows: ( 7 days Jamaica (28 9 to 5 10 91); 3 days USA (Oct Nov 91) ( 6 days Jamaica (19 1  to 24 1 92); 2 days USA (Jan 92)
<b>and</b>	( 0.8 man-months (24 days) - split missions as follows:
<b>Date required</b>	11-57 ( 4 days USA (Oct Nov 91); 10 days Jamaica (29 11 91 - 8 12 91) ( 6 days Jamaica (19 1 92 - 24 1 92); 4 days USA (Jan 92).
<b>Duty station</b>	Kingston, Jamaica and home base (USA)
<b>Purpose of project</b>	To establish an Agro-Food Processing Unit at JAMPRO capable of providing information and advisory services to the food processing industry for the promotion of production efficiency in the agro food processing industry.
<b>Duties</b>	<p>The consultants will be assigned to the Processed Food Unit at JAMPRO, the implementing agency of the Government of Jamaica. They will work closely with the JAMPRO Processed Food Unit and the Cooperative Associations or the private manufacturing firms of the agro industry subsector, which are identified in this project for intervention. The main responsibilities of the consultants, who will work closely with each other, will be to:</p> <ul style="list-style-type: none"> <li>- Draw up plans of action for the selected enterprise and its subsidiaries, conducive to its manufacturing and marketing programme. From among these plans of action will be selected, in coordination with the management of the enterprises, certain concrete activity plans for immediate intervention; the Activity plans for the intervention in the selected processed agro food enterprise will be instrumental in demonstrating to the sub-sector the possibility and the benefits of adopting new forms of organization and production.</li> <li>- Develop an in-depth diagnosis of the industrial system of production for the food processing units of the selected agro food enterprise. This diagnosis should lead to the identification of the internal and external factors influencing the enterprise under analysis and their impact on the development of the sector as a whole.</li> <li>- Plan and prepare seminar/workshops for the dissemination of the main findings of the study.</li> </ul> <p style="text-align: right;">.... / ...</p>

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Applications and communications regarding this Job Description should be sent to:  
 Project Personnel Recruitment Section, Industrial Operations Division  
 UNIDO, VIENNA INTERNATIONAL CENTRE, P.O. Box 300, Vienna, Austria

The detailed workplan for the consultants will look as follows:

11-56:

28|9|91 to 5|10|91 Initial site visit in Jamaica (7 days).  
Introductions, explanation of methods and purposes of interventions; review needs, assessment documents; interviews; data collection; develop project opportunities.

Oct|Nov.91 3 days home base work: Review notes; prepare internal report to the second consultant appointed for the project on findings, observations, recommendations; meet with second consultant twice, once to review report and once to review his plan.

19|1|92 to 24|1|92 6 days site visit to Jamaica to further implement and develop long-term recommendations.

Jan 92 2 days home base work to maintain contact with project; prepare draft final report including long range recommendations; review with second consultant and finalize.

11-57:

Oct|Nov.91 4 days USA to study internal report prepared by the other consultant appointed for the project; develop follow-up questions; develop an action plan; review with the other consultant the report; communicate with JAMPRO|UNIDO.

29|11|91 to 8|12|91 10 days site visit to Jamaica to initiate action plan and specific projects for CGA, JCGA (Bog Walk), CDC (May Pen) and Marketing Unit,

19|1|92 to 24|1|92 6 days site visit to Jamaica to further implement and make corrective actions.

Jan 92 4 days USA to maintain contact with project and prepare final report together with second consultant.

As said above the two consultants will be expected to prepare a joint technical report, setting out their findings and recommendations to the Government for further action which might be taken.

**Qualifications**

Industrial engineers and/or industrial economists, with extensive experience in formulating and implementing restructuring programmes in the agro food industry enterprises.

**Language**

English.

ANNEX II

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THE UNIVERSITY OF MASSACHUSETTS  
THE MAURICE A. DONAHUE INSTITUTE



*Managerial Needs Assessment:*

*Functional Gap Analysis  
Instrument for the  
Manufacturing Firm*

*May 1991*

**DESCRIPTION**

This document, the Gap Analysis, is one part of a diagnostic process designed to assist managers in analyzing their own firm's competitive strengths and weaknesses. The overall diagnostic process focuses the attention of both senior management and the consultant on seven basic functions that should be present in any manufacturing firm. The challenge is to complete the analysis, and identify and implement critical decisions or strategic steps to improve the foundation upon which the firm is built. There is an implicit assumption in this process that, while entrepreneurial qualities and characteristics are requisite to starting a manufacturing firm, senior management often needs to develop the means to organize and delegate responsibility, thus allowing the entrepreneur to concentrate on what he/she does best.

**ACKNOWLEDGEMENTS**

The idea for this consulting intervention process originated in 1989 with William Ernen of the University of Massachusetts/Donahue Institute, and comes from his extensive experience in working with small manufacturers. In 1990 Professors Dean Schroeder and Robert Hopley, faculty from the UMass-Amherst School of Management were hired with the support of Bay State Skills funding to design a diagnostic tool to be used with the full involvement of the client to analyze a firm's basic managerial organization and capacity. During that year five firms from the plastics industry in Pittsfield participated in the original development and trials of the process and tool. Since that time at least five more firms have utilized the process and interest in the service continues to grow. If you have questions about this tool and process, please contact William Ernen, University of Massachusetts, Donahue Institute, 221 Middlesex House, Amherst, MA 01003, 413-545-0001

**INSTRUCTIONS**

This document contains three sections which need to be completed by the senior manager(s). Instructions for each section proceed that section. The document may be completed by chief executive officer, collectively by the most senior managers, or individually by senior managers. In any case it is important to clarify this decision and identify below who completed the analysis. To participate in this analysis you must accept that this document represents an ideal. Do not become so self critical in completing this document that you lose perspective on the objective: identifying critical competitive strengths and weaknesses. Please begin this analysis by identifying yourself and your firm.

Name/Title: \_\_\_\_\_  
Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
Telephone: \_\_\_\_\_ FAX: \_\_\_\_\_

Please list names and titles of others who participated in this effort:

Name/Title: \_\_\_\_\_  
Name/Title: \_\_\_\_\_  
Name/Title: \_\_\_\_\_  
Name/Title: \_\_\_\_\_  
Name/Title: \_\_\_\_\_

**PART I: MANAGERIAL OVERVIEW**

Every small manufacturing organization may consist of the seven functional areas found below. Each of these functions is important to successful operation and growth of a business and will provide the basic framework for this organizational assessment instrument.

Please carefully read the brief function descriptions, then rank order the functions according to their importance in improving your company's competitiveness. (1 = highest priority, 7 = lowest priority). For the time being, please ignore the right hand "GAP SCORE" column.

FUNCTION	RANK ORDER	GAP SCORE
<u>ADMINISTRATION</u>	_____	_____
<p>Administration is split into two perspectives. First, how is your company operating on a daily, weekly, monthly, quarterly and annual basis? Are there adequate procedures and do the routine things get done routinely (responding to quotation requests, order processing, work scheduling, billing, costing, filing, etc.). This is the operational view of administration. Secondly, is it clear throughout your company what the goals are, and where the company is headed? What are the areas in need of improvement, who is responsible and what are they doing to improve? This is the strategic view of administration.</p>		
<u>MARKETING FUNCTION</u>	_____	_____
<p>This covers how your product gets sold. Do you have sales targets, budgets, and programs? Is your pricing profitable? What are your target markets from a product and geographical perspective? What promotional plans do you have and are they working?</p>		
<u>ENGINEERING/DESIGN/TECHNOLOGY</u>	_____	_____
<p>This function covers the technological knowledge required to design and produce your products and to select, operate and maintain your processes. It begins with blue print interpretation and machine operating skills, and extends to the introduction of new technology and the production of different products and services.</p>		
<u>MANUFACTURING</u>	_____	_____
<p>How satisfied are your customers with your cost, quality and delivery capabilities? How satisfied are your employees, your banker and you on those same three vital production factors.</p>		
<u>SERVICE</u>	_____	_____
<p>This function is involved with supplying the customer with the things they need other than the product: Training order status, installation, trouble-shooting, after sales maintenance, quality information, testing certificates, etc. Customer relations is another way to look at this.</p>		
<u>PERSONNEL</u>	_____	_____
<p>This function covers all matters related to the human resources needed to run the business: workforce skills, recruiting, training, compensation and benefits, employee communication and motivation, etc.</p>		
<u>FINANCE</u>	_____	_____
<p>This function covers the financial accounting, such as accounts payable and receivable, treasury and legal/tax reporting, and managerial accounting, such as financial forecasting, cost analysis and control, etc.</p>		



**PART II: DETAILED ASSESSMENT**

In Part II each of the seven major functions is broken down into critical subfunctions which help narrow our focus on specific activities. Please rank each of these subfunctions (using the scales provided) in terms of their competitive importance to your firm and your company's strength in that area relative to your competitors.

To help target improvement programs, please attempt to balance your scoring (i.e., there should be roughly an equal number of 1 and 5's and an overall average score of 3). A suggestion: you may want to begin by choosing the function/subfunction most important to you and then continue on to the next most important subfunction.

Scale: Competitive Importance 1 = Primary, highly important 5 = Of no importance  
Relative Strength 1 = Stronger than all rivals 5 = Weaker than all rivals

	Competitive Importance	Relative Strength	Capability Gap
<b>ADMINISTRATION</b>			
Business Planning	1 2 3 4 5	1 2 3 4 5	_____
Organizational Structure	1 2 3 4 5	1 2 3 4 5	_____
Effective Business Systems (Administrative & Office Procedures)	1 2 3 4 5	1 2 3 4 5	_____
Health and Safety Records	1 2 3 4 5	1 2 3 4 5	_____
Legal	1 2 3 4 5	1 2 3 4 5	_____
Daily - Weekly - Monthly Production Control Reports	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
			<b>TOTAL</b> [ ]

**MARKETING**

Coherent Competitive Strategy	1 2 3 4 5	1 2 3 4 5	_____
Well Defined Target Market			
Customers/markets	1 2 3 4 5	1 2 3 4 5	_____
Type of work	1 2 3 4 5	1 2 3 4 5	_____
Geographic			
local	1 2 3 4 5	1 2 3 4 5	_____
regional	1 2 3 4 5	1 2 3 4 5	_____

	Competitive Importance	Relative Strength	Capability Gap
national	1 2 3 4 5	1 2 3 4 5	_____
international	1 2 3 4 5	1 2 3 4 5	_____
Long-term Outlook of Current Customers/Markets	1 2 3 4 5	1 2 3 4 5	_____
Organized and Effective Quoting Process	1 2 3 4 5	1 2 3 4 5	_____
Profitable Pricing Policies	1 2 3 4 5	1 2 3 4 5	_____
Marketing Literature	1 2 3 4 5	1 2 3 4 5	_____
Trade Shows	1 2 3 4 5	1 2 3 4 5	_____
Sales force	1 2 3 4 5	1 2 3 4 5	_____
Inquiry Follow-up	1 2 3 4 5	1 2 3 4 5	_____
Breadth of Product Line/Jobs Produced	1 2 3 4 5	1 2 3 4 5	_____
Packaging Products	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____

TOTAL

[ ]

**ENGINEERING/DESIGN/TECHNOLOGY**

Preventative Maintenance Program	1 2 3 4 5	1 2 3 4 5	_____
Computer-Aided Process Equipment	1 2 3 4 5	1 2 3 4 5	_____
Computer-Aided Design (CAD)	1 2 3 4 5	1 2 3 4 5	_____
CNC Programming Capability (Program Operator)	1 2 3 4 5	1 2 3 4 5	_____
Tool Design and Fabrication	1 2 3 4 5	1 2 3 4 5	_____
Documented (Pictorial) Process Instructions	1 2 3 4 5	1 2 3 4 5	_____
Product Design Work	1 2 3 4 5	1 2 3 4 5	_____
Design Engineering	1 2 3 4 5	1 2 3 4 5	_____
Process/Manufacturing Engineering	1 2 3 4 5	1 2 3 4 5	_____
Blue Print Reading	1 2 3 4 5	1 2 3 4 5	_____
Down-loading from Customers' CAD Systems	1 2 3 4 5	1 2 3 4 5	_____

	Competitive Importance	Relative Strength	Capability Gap
Technology Planning	1 2 3 4 5	1 2 3 4 5	_____
Linking Technology Planning with Customers' Planning	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
<b>TOTAL</b>			[ ]

**MANUFACTURING**

**Production Control**

Material Flow & Handling	1 2 3 4 5	1 2 3 4 5	_____
Scheduling (Production - Backlog, etc.)	1 2 3 4 5	1 2 3 4 5	_____
Machine Loading (capacity balancing)	1 2 3 4 5	1 2 3 4 5	_____
Capability Matching	1 2 3 4 5	1 2 3 4 5	_____
Shipping and Receiving - Packaging	1 2 3 4 5	1 2 3 4 5	_____
Production Control Feedback on In-Process and Completed Work	1 2 3 4 5	1 2 3 4 5	_____
Just In Time (JIT) Customer Requirements	1 2 3 4 5	1 2 3 4 5	_____
Processing Time and WIP Control	1 2 3 4 5	1 2 3 4 5	_____
Problem Reporting - Resolution	1 2 3 4 5	1 2 3 4 5	_____

**Costing**

Finished Goods Inventory	1 2 3 4 5	1 2 3 4 5	_____
Inventory Cost Control	1 2 3 4 5	1 2 3 4 5	_____
Purchase Order Control	1 2 3 4 5	1 2 3 4 5	_____
Material Identification	1 2 3 4 5	1 2 3 4 5	_____

**Inventory Cost**

Standard Cost(s) (Historical Data)	1 2 3 4 5	1 2 3 4 5	_____
Comparison (Standard to Actual)	1 2 3 4 5	1 2 3 4 5	_____
Labor Hour Control (efficiency, overtime)	1 2 3 4 5	1 2 3 4 5	_____
Machine - Center - Area Costs (efficiency)	1 2 3 4 5	1 2 3 4 5	_____
Manufacturing Overhead Costs Controls	1 2 3 4 5	1 2 3 4 5	_____

	Competitive Importance	Relative Strength	Capability Gap
Cost Savings Methods and Problem Solving	1 2 3 4 5	1 2 3 4 5	_____
<b>Quality</b>			
Quality Manual/Procedures/Communications	1 2 3 4 5	1 2 3 4 5	_____
Methods for Controlling Process	1 2 3 4 5	1 2 3 4 5	_____
Quality Planning	1 2 3 4 5	1 2 3 4 5	_____
Quality Cost	1 2 3 4 5	1 2 3 4 5	_____
Receiving/In-Process/Final/Audit Inspection	1 2 3 4 5	1 2 3 4 5	_____
Defect Prevention Methods (SPC)	1 2 3 4 5	1 2 3 4 5	_____
Material Review Board - Engineering Change Notice (ECN) Control	1 2 3 4 5	1 2 3 4 5	_____
Inspection Measurement Device Control	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
<b>TOTAL</b>			[ ]

**SERVICE**

Close Customer Relations	1 2 3 4 5	1 2 3 4 5	_____
Provide Quality Data	1 2 3 4 5	1 2 3 4 5	_____
Communication (Speaking the Customer's Language - e.g. terms and jargon)	1 2 3 4 5	1 2 3 4 5	_____
Meet Customer Audits	1 2 3 4 5	1 2 3 4 5	_____
Follow-through on Customer Inquiries	1 2 3 4 5	1 2 3 4 5	_____
Supply Test Data as Needed	1 2 3 4 5	1 2 3 4 5	_____
Offering Value-Added Services (Assembly, Painting, Design Help, etc.)	1 2 3 4 5	1 2 3 4 5	_____
Trouble Shooting Customer Complaints and Problems	1 2 3 4 5	1 2 3 4 5	_____
On-site Customer Services (Installation, Training, etc.)	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
<b>TOTAL</b>			[ ]

PERSONNEL	Competitive Importance	Relative Strength	Capability Gap
Recruiting	1 2 3 4 5	1 2 3 4 5	_____
Training and Development	1 2 3 4 5	1 2 3 4 5	_____
Job Design and Classification	1 2 3 4 5	1 2 3 4 5	_____
Compensation and Benefits	1 2 3 4 5	1 2 3 4 5	_____
Promotion	1 2 3 4 5	1 2 3 4 5	_____
Motivation and Productivity	1 2 3 4 5	1 2 3 4 5	_____
Employee Problems (Absenteeism, drugs, discipline, etc.)	1 2 3 4 5	1 2 3 4 5	_____
Task Communication	1 2 3 4 5	1 2 3 4 5	_____
Policy Communication	1 2 3 4 5	1 2 3 4 5	_____
Employee Involvement	1 2 3 4 5	1 2 3 4 5	_____
Employee Relations	1 2 3 4 5	1 2 3 4 5	_____
Personnel Records	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
<b>TOTAL</b>			<b>[      ]</b>

**FINANCE**

*Financial Accounting*

Effective Accounting Services	1 2 3 4 5	1 2 3 4 5	_____
Effective In-House Accounting Support	1 2 3 4 5	1 2 3 4 5	_____

*Managerial Accounting*

Monthly P & L Statements	1 2 3 4 5	1 2 3 4 5	_____
Monthly Balance Sheet & Cash Flow	1 2 3 4 5	1 2 3 4 5	_____
Budgeting	1 2 3 4 5	1 2 3 4 5	_____

Does your company compare actual performance with budgeted in the following areas:

Marketing

Sales	1 2 3 4 5	1 2 3 4 5	_____
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	Competitive Importance	Relative Strength	Capability Gap
Promotion	1 2 3 4 5	1 2 3 4 5	_____
Distribution	1 2 3 4 5	1 2 3 4 5	_____
<u>Manufacturing</u>			
Labor	1 2 3 4 5	1 2 3 4 5	_____
Machines, etc.	1 2 3 4 5	1 2 3 4 5	_____
<u>Technology</u>			
Production Design	1 2 3 4 5	1 2 3 4 5	_____
Process	1 2 3 4 5	1 2 3 4 5	_____
<u>Raw Materials</u>			
Yield	1 2 3 4 5	1 2 3 4 5	_____
Turnover	1 2 3 4 5	1 2 3 4 5	_____
Cost	1 2 3 4 5	1 2 3 4 5	_____
<u>Service</u>			
Scrap/Re-work	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
Other: _____	1 2 3 4 5	1 2 3 4 5	_____
		<b>TOTAL</b>	[ ]

**PART III:      Transfer the totals of each subfunction to page 3.**

**PART IV:      Specific Requests, Suggestions, Comments**

The purpose of this survey is to expose areas in which improvement is needed. We also wish to improve our performance. Please offer your suggestions and comments on how this instrument can be improved.

1.      Please state any comments or suggestions you may have:

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2.      Please list specific programs or courses that you would like offered:

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PART V: ACTION AGENDA WORK SHEET

SUBFUNCTION \_\_\_\_\_ GAP \_\_\_\_\_ PRIORITY \_\_\_\_\_

Potential Solution A \_\_\_\_\_

Resources Required \_\_\_\_\_

Money \$ \_\_\_\_\_

Management Time (hours and by whom) \_\_\_\_\_

Quality of Expected Outcome \_\_\_\_\_

Potential Solution B \_\_\_\_\_

Resources Required \_\_\_\_\_

Money \$ \_\_\_\_\_

Management Time (hours and by whom) \_\_\_\_\_

Quality of Expected Outcome \_\_\_\_\_

Potential Solution C \_\_\_\_\_

Resources Required \_\_\_\_\_

Money \$ \_\_\_\_\_

Management Time (hours and by whom) \_\_\_\_\_

Quality of Expected Outcome \_\_\_\_\_

Potential Solution D \_\_\_\_\_

Resources Required \_\_\_\_\_

Money \$ \_\_\_\_\_

Management Time (hours and by whom) \_\_\_\_\_

Quality of Expected Outcome \_\_\_\_\_

Action Agenda For Subfunction \_\_\_\_\_

Steps to be Taken \_\_\_\_\_

By Whom \_\_\_\_\_

By When \_\_\_\_\_

Resources to be Employed \_\_\_\_\_

Benchmarks of Outcome and Times \_\_\_\_\_

Measure of Outcomes \_\_\_\_\_



INTERIM REPORT BY WILLIAM ENNEN

**OVERVIEW**

During the late Summer of 1991, I was asked by Professor Robert Hopley, an associate of mine at the University of Massachusetts, to participate in a consultation project sponsored by the United Nations Industrial Development Organization (UNIDO). The object of this consulting intervention has been to advise/assist UNIDO and the Agri-Food Processing Unit within Jamaican Promotions Ltd. (JAMPRO) to enhance export capability of the Jamaican citrus industry through service to Citrus Growers Association (CGA). CGA - a complex amalgam of food processors and 10,000 small farmers - represents the current and historic umbrella organization for the Jamaican citrus industry.

During September of 1991 I spent seven days in Jamaica conducting a data-gathering and assessment visit. Upon return my observations were shared with Professor Hopley in a series of discussions and internal documents. The recommendations found herein are intended to help guide Professor Hopley during his November, 1991 visit to Jamaica. I have assumed that this document will be utilized at Professor Hopley's discretion.

In short, based upon my interviews and observations, I am recommending that Professor Hopley initiate a strategic planning process for UNIDO, JAMPRO, and CGA participants. This process should focus the interests to develop export products and markets for the Jamaican citrus industry. The primary assumption underwriting these recommendations is that the export capability of CGA can best be served by conducting a thorough process to explicate the intention of the parties, and to define resources which will be required to achieve this clarified intention.

**INTRODUCTION**

The general goal of this consulting intervention was to focus public and private sector resources on the CGA. The more specific intention was to improve processing and business practices within CGA, thus leading the way to greater participation by CGA in export opportunities.

The public sector has demonstrated a motivation to increase citrus exports which, at times, seems to exceed the motivation of CGA. The motivation to increase all export efforts has recently been catalyzed by the lifting of currency controls; controls which have sheltered the Jamaican dollar for decades. Yet, it remains unclear: can the public sector commit the kind of resources and talent necessary to achieve this goal? My recent visit indicates that while CGA is assembling structures and staff required to be more fully competitive, the Jamaican government, as in every other nation, will play a key role in servicing the internal development of the private sector.

As consultants we are afforded the opportunity in this instance to differentiate between two plausible and useful types of consulting interventions: "plant level interventions" and "sector level interventions."

The plant level intervention involves the application of team-oriented, problem solving practices applied to relatively objective, narrowly focused projects which are designed to enhance productivity, performance, and quality. This type of intervention, (e.g., think of the Scott's Project) occurs within a firm, and the objective becomes something that is readily discussed, defined, and subjected to action.

The sector level intervention is characterized by the formation of new working relationships among private sector competitors, among public sector agencies, and between the former and the latter. This type of intervention is more unique, but is called for in any instance where the public sector has specific kinds of expertise or resources that can

be utilized in addressing a private sector issue. All indications are that JAMPRO has a distinct responsibility within Jamaica to support and foster the citrus industry.

#### RECOMMENDATION

We are specifically recommending that JAMPRO and CGA commit resources and staff time to participate in a strategic planning process. Such a process will help all participating organizations clarify their intentions and identify the resources which would be needed to achieve increased exports from the Jamaican citrus industry. At the conclusion of such a process all participating organizations will know what would be required to achieve the long range goal of increased exports.

This intervention, designed and built around the timeframe established by the Tripartite Meetings, will engage both the private sector and the public sector in a series of meetings to define the effort to increase/develop export citrus products/markets. While it is doubtful that such a planning process could be completed in said timeframe, the effort will establish a clear process and vehicle for completing the task. In addition, if responsibility is delegated, several individuals from both the private and public sector will obtain hands on experience in leading and facilitating both formal and informal groups (which has become one of the key management skills in modern organizations).

A strategic planning effort that spans the public and private sector will require each sector to be represented by both senior managers and staff professionals. We have made suggestions for who should participate, but clearly we want to encourage senior representatives from each sector to evaluate this issue for themselves. In any case we would differentiate between two types of representatives: policy and staff.

The first type involves the participation of senior representatives from JAMPRO and CGA. We recommend that JAMPRO be represented by Norman Prendergast, Group Director, Agriculture and Agro-Industries Office. We recommend that CGA be represented by Ivan Hope Tomlinson, Chairman, CGA. In both cases we would expect direct participation from these individuals in policy and planning discussions. Both Mr. Prendergast and Mr. Tomlinson should evaluate who from their respective organizations should also participate. It is highly recommended that Victor Nugent, Group General Manager, Jamaica Citrus Growers, Ltd. and Lennox Picart participate in these discussions. Additionally we would expect Mr Tomlinson to identify specific individuals from the CGA Board of Directors to participate in this process (e.g., Mr. Bent who has extensive technical expertise as a grower). In addition we would expect John Wilson to participate in representation for UNIDO.

The second type of participation should involve specialists/professionals from each sector. We assume the following individuals will participate: Kathleen Goldson, JAMPRO, Lesiane Barnes-Royer, JAMPRO, Mr. Duval, JCG, and Mrs. William, JCG. In addition there may be other individuals from CGA/JCG who could attend, but were not on staff during the September visit.

Early evidence that this intervention is succeeding will be the development of new working partnerships within and among all of the participating representatives. Further evidence will be the experience of seeing work groups form, address broad issues, and delegate assignments based upon the required skill/talent, with little concern as to whether or not the individual comes from the private or public sector. Certainly the public sector can decide to support plant level interventions instead, but all indications suggest that most of the participants are looking for a more strategic intervention - one that leads to a profound refocusing of attention from domestic products to export products.

Our immediate request is that the general feasibility of this recommendation be discussed between and among JAMPRO and UNDP officials so that Professor Hopley will have your views upon arrival in Jamaica.

#### GENERAL TIME OUTLINE

NOVEMBER: 1. assemble UNIDO/JAMPRO/CGA participating representatives  
2. do mission, goals, and objectives  
3. assign staff investigation phase

DECEMBER: 1. conduct staff assignments  
2. conduct staff update meetings  
3. select strategies

JANUARY: 1. develop/describe resources, organization, and control  
2. implementation

This outline assumes that the participating organizations have made a commitment to the process.

#### EXPECTATIONS FOR NOVEMBER

The November visit should be dedicated to gaining acceptance of the idea, setting up teams and decision-making processes, and conducting the first stages of planning. The public sector will view the private sector as their "customer" and the object will be to provide assistance and service which helps CGA start and complete a strategic planning process. Due to its unique resources, JAMPRO needs to both assist the planning process and be a full participant.

None of this is possible without a fully realized commitment on the part of JAMPRO and related agencies who compliment JAMPRO's expertise. Every effort should be made to complete the commitment of public sector during the November visit.

#### THOUGHTS ON HOW TO PROCEED

In order to achieve the overall goal - a sector level intervention to increase the involvement of CGA in the export business - three steps must be engaged. First, public sector representatives must determine whether or not to accept this intervention. Second, CGA must decide whether or not to pursue this intervention. Implicit in these two decisions is the willingness of the private and public sector to work together.

During the November consulting intervention participants should press for the development of a general timeframe, ongoing meeting format, the individuation of roles/functions for participants, and the dedication of a decision making process. This kind of effort in November should clearly establish the unambiguous expectation that responsibility and authority will be delegated.

^ principal tasks to be achieved in November will be to:

- \* identify a government support team
- \* identify a CGA strategic planning team
- \* identify who will be responsible for coordinating the interaction of these two teams in the absence of the consultants
- \* conduct mission and goals session
- \* make assignments for December

This process should be viewed as unique because, by design, the process will confirm to the private sector that the public sector has resources which will be required to achieve increased exports. The government support team should reflect two levels of participation. First there should be broad representation from government, especially from all of the individuals who have and are willing to provide service in this endeavor. The second level of participation should be that of a small working group that is focused on achieving a strategic plan for CGA. The latter should draw from and inform the former.

#### **CLOSING COMMENTS**

Recent experiences have convinced this consultant that it is all too easy for the public and private sector to lecture each other on what it will take for any national economy to be competitive in world markets. The more difficult work, work which we all face, is to apply the concepts of teamwork to concerns which inherently cut across the public and private sector domains. A strategic planning process affords lead representatives from both sectors the opportunity to demonstrate this commitment.

ANNEX V

ATTENDANCE LIST FOR SMG SESSION

Ivan Hope Tomlinson	Chairman, CGA Ltd., Executive Chairman, JCG Ltd., President, CDC Ltd.
Ken Garfield	General Manager, CDC Ltd.
Sharlie Jobson	Board Member, CGA Ltd.
Frank Weir	Board Member, CGA Ltd.
Kathleen Goldson	Processed Food Specialist, JAMPRO
Kenneth Newman	SMG Chair, Board Member, CGA Ltd.
Professor Robert Hopley	Hopley and Associates; University of Massachusetts, Amherst, Mass.
William Ennen	Donahue Institute, University of Massachusetts, Amherst, Mass.
Desmond Duval	Marketing Manager, JCG/CDC/CPC
John Wilson	International Project Co-ordinator, UNIDO/JAMPRO
Norman Prendergast	Group Director, Agriculture & Agro-Industries Office, JAMPRO
Lennox Picart	Director, Agro-Industries Div., JAMPRO
C.V. Bent	Vice Chairman, CGA Ltd.
Victor Nugent	Group General Manager, JCG/CPC/CDC
Cristian Gillen	UNIDO Country Director, Caribbean Basin
Kimmo Kartano	Junior Professional Officer, UNIDO