

27 JUNE - 6 JULY 1983

BACKGROUND

1. As part of ILO's assistance to the ANC in Morogoro, the following three projects had been envisaged to be implemented at the Solomon Mahlangu Freedom College:
 - A 4-month Training and upgrading of book-keeping and accounting staff
 - A repetition of a 4-month Upgrading of clerical and secretarial staff in Lusaka
 - 18-month Development of a Secretarial training programme
2. The ILO Consultant who had been running the 4-month course in Upgrading of clerical and secretarial staff in Lusaka was asked to visit the Solomon Mahlangu Freedom College (hereafter called SOMAFCO) to discuss the projects with the Principal.
3. The mission took place between 29 June and 5 July, where three days were spent at the SOMAFCO and two days at the ILO office in Dar-es-Salaam on compiling the report.
4. The Consultant met with the Principal Mr. Tim Maseko and his deputy Mr. Peter Mohlala.

TRAINING AND UPGRADING OF BOOK-KEEPING AND ACCOUNTING STAFF FOR 4 MONTHS

Participants

5. About ten existing book-keeping/accountancy staff in Morogoro would be selected to participate in the course.
6. The questionnaire (Appendix 1) provided by the ILO in Geneva to find out the participants' academic background and job experience in order to assess the training needs, had been filled in by the ANC in Lusaka both for the Zambian and Tanzanian staff. The Principal wanted, however, to make a few amendments regarding the Tanzanian staff. The amended questionnaire would be forwarded to Geneva shortly.

Time

7. The course could start in September/October and could be run simultaneously with the 4-month course in Upgrading clerical and secretarial staff (see paragraph 15).

The participants would be released three hours daily Monday through Friday during the four months. To make maximum use of the time available, the Consultant who would be appointed to run the course, should preferably be given some time for preparations before the course starts.

Syllabus

10. The ANC in Lusaka had prepared a tentative syllabus for the course. It was felt by the Principal and his deputy that the syllabus was a bit shallow and that it should be extended, as it seemed that time would allow for some additions.
11. A syllabus for an envisaged 18-month book-keeping/accountancy course had been prepared at SOMAFCO. Some of the items included there could be added to the 4-month syllabus as much as time would allow. The following additions were suggested:
 - Business mathematics
 - Economics
 - Commerce
 - Principles of management and administrationSee separate syllabus!

Consultant

13. Both the ANC in Lusaka and in Morogoro felt that they had one or two accountants who were fully qualified to run this course. Their cv's would be forthcoming shortly.

UPGRADING AND CLERICAL AND SECRETARIAL STAFF, 4 MONTHS

Participants

14. There would be a minimum of 10 and a maximum of 15 participants, all presently working in various capacities at the SOMAFCO.

Time

15. The starting date could be September/October, running simultaneously with the 4-month book-keeping course (see paragraph 7). The participants would be released three hours daily Monday through Friday.

Venue

16. An adequate training room would be made available.

Equipment

17. If the six typewriters purchased for the course in Lusaka were transferred to SOMAFCO, another nine typewriters would be needed, preferably electric.

Consultant

19. Adequate accommodation for the Consultant would be made available.
20. If at all possible, the Consultant should be given some secretarial assistance.

Syllabus

21. The course contents would be identical with the Lusaka course. See separate Report.

DEVELOPMENT OF A SECRETARIAL TRAINING PROGRAMME FOR ANC, 18 MONTHS

Course organization

22. Apart from the preparation of curricula and training material as well as the training of two secretarial instructors the project proposal envisages the organization of pilot courses for typists, secretaries and other office staff.
23. It seemed that the SOMAFCO would benefit from a full secretarial programme, training beginners on an elementary, intermediate and advanced level.
24. A tentative programme was drawn up on how to best utilise the time available from various aspects, as follows:

Stage 1 -3 months (February-April)

- Planning curricula
- Producing training material
- Instructing and practising on modern training methods and techniques
- Micro-teaching

The Consultant and the two Instructors should collaborate closely in all the aspects.

Stage 2 -4 months (May-August)

- Elementary course
- The major task of instruction should at this stage be undertaken by the Consultant with the assistance of the Instructors. The Instructors would gradually take over under close supervision of the Consultant.

Stage 3 -4 months (October-January)

- Intermediate course
- More and more of the actual instruction would be taken over by the Instructors under supervision and guidance by the Consultant
- 1 month (February)
- Evaluation; preparation for the advanced course

Stage 4 - 4 months (March-June)

- Advanced course
- The instructors should at this stage be more or less fully capable of running the course, although still guided and supported by the Consultant.

Stage 5 -1 month (July)

- Evaluation and analysis of the results achieved.

Syllabus

25. The following subjects were suggested to be included in the course programme (Appendix 2):
 - Business communications
 - Clerical and secretarial duties
 - Commerce
 - Elementary bookkeeping and accountancy
 - Typing
26. Shorthand was discussed at length. It was felt that very few of the trainees would have the required language and

educational background to be able to cope with the Pitman New era or 2000 systems. As there did not seem to be a very high demand on stenographers, it would probably be a waste of time and effort to include shorthand in the programme.

27. On the other hand, it was suggested that instructions on a speedwriting system might be worthwhile. This would require much less time and it would also equip the trainees with a competence whereby they could be employed as shorthand/typists. The speed that can be acquired with a speedwriting system, is in most cases more than sufficient for normal office needs. It was generally recommended that speedwriting should be included.

Distribution of subjects in the time-table

28. A tentative distribution of the subjects on a weekly basis through the elementary, intermediate and advanced stages: was drawn up as follows:

	Elementary	Intermediate	Advanced	Total
Typing	10	10	10	480
Cler/Secr duties	6	6	6	288
Bus. Communication	3	3	3	144
Commerce	3	2	1	96
Book-keeping	3	2	1	96
Speedwriting	-	2	4	96
	25	25	25	1.200
	==	==	==	=====

Equipment

29. A list of suggested equipment needed for the course is included in Appendix 3.

Accommodation

30. Adequate accommodation for the Consultant and the two Instructors would be made available.

Venue

31. The ideal training facilities would be three rooms, one for typing, one for general subjects, and an Office laboratory. This was not feasible, however.

One large training room, roughly 10 x 6,5 m, would be available. Part of it could be turned into an Office laboratory and the main part of the room would accommodate 25 tables. The tables were fairly large and could probably serve as both typing desks and desks for working on other subjects. The number was not sufficient but those tables could be produced at the SOMAFCO.

An adjacent room, roughly 3 x 6,5 m, could be used for training on various office machinery. It would be possible to open up a door into the large training room.

The Office laboratory/ies could then be equipped with different "stations", eg a Reception area with a telephone exchange and a number of telephones connected at the "stations".

Under the circumstances this arrangement could probably be quite satisfactory.

FELLOWSHIPS

32. It was not possible for the Consultant to obtain names of secretarial and accountancy persons to be sent on fellowships before leaving Lusaka, although the urgency of the matter was stressed frequently. It seems that it would be difficult for the ANC Headquarters to release any of those participating in the Office Skills course there. Almost any of them would have the potentials to become a good instructor.
33. However, the Principal of SOMAFCO promised that a telex would be sent shortly to Geneva giving the names of two or three accountants and two secretarial staff.

CONCLUSIONS

34. From the discussions held it would seem appropriate to organise the following types of course at the SOMAFCO:
- A 4-month Training and upgrading course for book-keepers and accountants
 - A repetition of the 4-month Upgrading of clerical and secretarial staff recently completed in Lusaka.
 - An 18-month Clerical and secretarial training programme for beginners
 - An 18-month Book-keeping and accountant training programme for beginners.

Dar-es-Salaam
6 July 1983

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1960s National Development: Training and Upgrading of
Book-keeping and Accounting Staff

Basic Information

	Numbers in Tanzania	in Zambia
<u>1. Prospective Trainees</u>		
ANC staff employed as:		
- book-keeping clerks	-	-
- assistant book-keepers	-	-
- book-keepers	-	-
- junior accountants	-	-
- accountants	-	-
- chief accountants	-	-
- others (specify)	-	-
Total men/women	--/--	--/--
Educational background		
- primary school	-	-
- junior secondary	-	-
- senior secondary	-	-
- post secondary	-	-
Previous accountancy training		
- formal course	-	-
- on-the-job	-	-
- none	-	-
Number of years of job experience: (from --- to ---)	--/--	--/--
<u>2. What are the major problems?</u>		
- lack of basic knowledge (book-keeping principles)	Yes/no	Yes/no
- lack of practical know-how (book-keeping operations)	Yes/no	Yes/no
- lack of analytical/decision-making skills	Yes/no	Yes/no
<u>3. Other information</u>		
- is a classroom available?	Yes/no	Yes/no
- Is an office for the consultant available	Yes/no	Yes/no
- is counterpart/instructor/supervisory staff available?	Yes/no	Yes/no
- How many?	-	-
<u>4. Any other relevant information?</u>		

Tentative course programme for the 18 month Clerical and secretarial course

Business Communications

- Various means of business communications
- Instructions, giving, receiving, conveying
- How to take notes of a speech and how to summarise it
- How to write memos from brief notes
- Formal invitations - composing, accepting, refusing
- Business letters - layout, language, types
- Abbreviations
- Proofreading and correction skills
- Stationery
- Report writing
- General letters (booking a hotel room etc.)

Clerical and secretarial duties

- Duplication
- Filing
- Mail handling and postal services
- Meetings
- Human and public relations - including Reception and good manners on the telephone
- Office organization
- Office supplies and aids
- Petty cash
- Reference books
- Safety and economy in the office
- Stock-keeping
- Telecommunications
- Travel arrangements
- Work place and good work habits
- Work planning
- Visual aids

Commerce

- Field and scope of commerce
- Retailer
- Wholesaler
- Buying and selling
- Stock-control
- Money and banking
- Credit policy
- Transport
- Insurance
- Advertising
- Warehousing and storage
- International trade
- Foreign business policy
- Foreign exchange
- Financial institutions

Elementary book-keeping

- | | |
|---------------------------------------|-----------------------------|
| - Ledger cash book | - Books of original entry |
| - Double entry book | - 3-column cash book |
| - Trial balance | - Petty cash book |
| - Trading and profitable loss account | - Bank statements |
| - Stock and drawings | - Adjustments and provision |
| - Balance sheet | - Receipts and payments |
| | - Income and expenditure |

Equipment list for 18-month Clerical and Secretarial courseHardware

- Typewriters- 25 minus those already received for the 4-month course, preferably electric
- Typing chairs - The SOMAFCO could make chairs but they would not be up to the required standard for a comfortable posture at the typewriter
- Photocopier - preferably a Xerox-type
- Ink duplicator
- Spirit duplicator
- Electronic scanner
- Franking machine
- paper binding machine
- Guillotine
- Overhead projector (2)
- slide projector
- taperecorder
- telephone exchange with 5 connected telephones/intercom
- telex machine
- letter opener
- filing cabinet (3)
- filing cupboard (3)
- visible card index (4 drawers)
- shredding machine
- in-out trays (15)
- bookshelves (might be produced at the SOMAFCO)
- pocket calculators (25)
- dictating machine

Software (the amounts needed could not be stated)

- Overhead transparencies
- Wax stencils
- Electronic stencils
- Photocopying paper
- Correction fluid
- Ink duplication paper
- spirit duplicating paper
- typing paper
- carbon paper
- envelopes
- tapes
- felt pens in different colours, permanent and non-permanent
- rulers
- erasers
- pencils
- ballpoint pens
- staplers, staples
- punches
- rubber bands
- paper clips
- file covers
- lever arch files
- datestamps
- scissors
- glue
- lettra-sets
- manila paper
- desk diaries
- desk pads
- pen trays

- pen holders
- drawing pins
- chalk
- chalkboard dusters
- notebooks for speedwriting
- note pads
- notebooks
- writing paper (lined and ruled)
- plastic pockets
- tippex
- typewriter keyboard chart

For all papers, the size should be A4

Textbooks

- A separate list will have to be prepared.

Equipment list for 18-month Book-keeping course

- Mini computers, type to be determined
- Pocket calculators, already included in the above list
- Software and textbooks to be specified