

p 89/8 - Trade Union - Shop Stewards 1/5c

# Skills for building organisation

THE CAPE TOWN  
TRADE UNION  
LIBRARY

**Taking Notes**  
**Taking Minutes**  
**Giving Report-Backs**  
**Giving Talks**  
**Writing Reports**

**A Shop Stewards Manual**

Produced by LACOM

# SKILLS FOR BUILDING ORGANISATION

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# INTRODUCTION

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Getting and carrying out mandates is one of the most important duties of a shop steward. This booklet has been prepared to help shop stewards carry out this duty.

In a democratic organisation the job of a representative is to represent other people's views and wishes - to carry out the mandate of the people who elected them.

For the people to feel that this is happening they must be able to know what their representatives are doing and saying.

They can only know this if they get report-backs from their representatives on what they have been doing. The representatives on their own cannot make decisions for the people. People must be able to discipline representatives who don't represent their views.

In unions workers must be able to hold their representatives accountable. In a democratic process there must therefore be the processes of MANDATES, REPORT-BACKS, AND ACCOUNTABILITY.

But we should ask ourselves, why is it so important for mandates, report-backs, and accountability to take place in democratic organisations? We spoke to a union organiser who explained it like this:

"If shop stewards don't report back then workers at the shop floor remain unknowing of what is going on and not participating in meetings or whatever union structure. Members can feel that there isn't anything being done by the union for them and in some instances we end up with resignations because people don't know what is going on and management can bring confusing things that are depressing to the members.

"In my experience report-backs are important because we keep members informed about the developments within the union. Also shop stewards can get fresh mandates on whatever they were given before.

"Without proper report-backs we will not achieve the aims we would like to achieve. A few individuals will end up taking decisions for a lot of people."

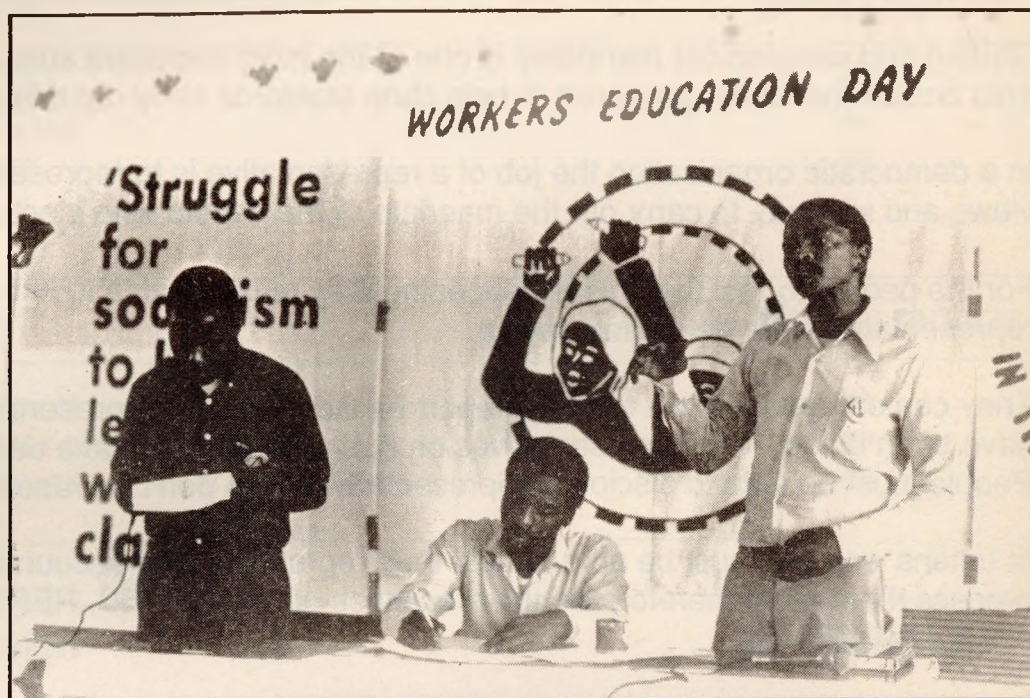
**COSATU unions** have set up democratic structures to take decisions at all levels where workers are struggling against capital.

But if organisation in the work places is weak, the unions will be weak.

Strong shop steward committees which are organised and act democratically are the key to the collective power of organised workers. This is because they will pass on the information that workers need to take part in making decisions in their organisations.

**The role of shop stewards in building worker-controlled democratic organisations is very important.**

One of the skills a shop steward needs is that of being able to talk to workers and address a big meeting.



In the unions, you are elected as shop stewards because you are leaders. You are elected by the members and are accountable to them.

Shop stewards are elected for a specific period of time and if workers lose confidence in you they can vote to remove you and elect new shop stewards. This is part of the democracy of our unions.

Some shop stewards think they can make decisions for all workers. They think that stewards can plan campaigns and other activities without discussing these plans with the workers. **When this happens shop stewards lose the support of the workers and start speaking only for themselves.** Any action shop stewards plan can then easily fail, because they cannot rely on the active support of the workers.

As shop stewards you need many skills to carry out all your duties effectively. A union organiser says:

"One of the skills that is needed is record keeping in that workers come with a problem and then as a shop steward you need to record what you have been told because what you have been told could be needed after 6 months when the issue comes up. And that's one of the skills a shop steward needs to have. Then the other skills are that of being able to talk to workers or address a big meeting, to report back, and to take minutes."

In South Africa there are many good shop stewards who cannot read or write.

Shop steward committees can work together on planning and presenting report-backs so that all shop stewards can participate fully in these activities.



**COSATU unions  
have set up  
democratic  
structures to take  
decisions at all  
levels where  
workers are  
struggling against  
capital.**

It is important that all workers fully participate in the democratic process of our unions. It must not matter whether they cannot read or write.

One of the aims of union education is to help workers develop their full potential:

"to create and transform skills and abilities so that they are accessible to the oppressed and exploited." (COSATU resolution, 1985)

**The aim of this booklet is to help shop stewards develop the skills of taking notes, writing minutes, reporting back and writing reports. You need these skills to help build strong, democratic, worker-controlled unions.**



**You can learn  
more if you work  
in groups because  
you can all share  
ideas**

## **HOW TO USE THIS BOOKLET**

The booklet is divided into 5 main sections:

- TAKING NOTES
- TAKING MINUTES
- GIVING REPORT-BACKS
- GIVING TALKS
- WRITING REPORTS

Each of the sections has information and activities to help you develop the skills of taking notes, taking minutes, giving talks and report-backs, and writing reports.

It is best to work through this booklet in groups because there are a lot of group activities. Also you can learn more if you work in groups because you can all share ideas.

# ACTIVITY: SKILLS FOR BUILDING ORGANISATION



By how you think about the skills that you need

TASK

Write down the views of your group in the table below

(7) What are the main problems with your group?

## Section 1 Taking Notes

(2) Why is it important to take notes?

# ACTIVITY: SKILLS FOR BUILDING ORGANISATION

AIM:

To help you think about the skills that you need to build organisation

TASK:

In your group, discuss these questions.  
WRITE DOWN THE VIEWS OF YOUR GROUP IN THE SPACE PROVIDED

(1) What are the main problems with apartheid education?

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(2) Why is union education important?

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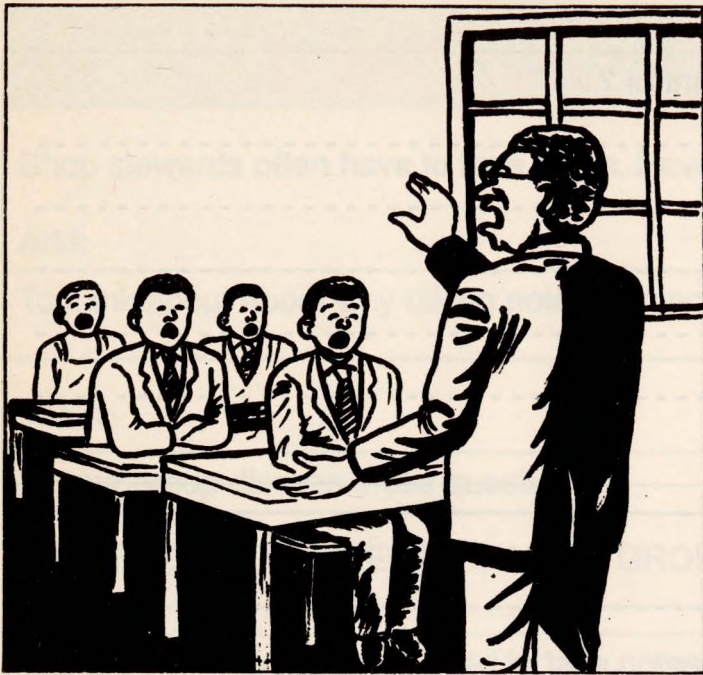
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3. How is union education different from apartheid education?

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(4) What is worker control?

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(5) Why is worker control important?

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**(6) How can education help build worker control ?**

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**(7) What are the duties of shop stewards?**

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**(8) What skills do you need to carry out these duties?**

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**(9) What skills do you feel you need to develop in order to operate more effectively?**

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# ACTIVITY: TAKING NOTES

Shop stewards often have to take notes. Have you thought of why you do this?

**AIM:**

To think about about why taking notes is important

**TASK**

In your group discuss these questions.

WRITE DOWN THE VIEWS OF YOUR GROUP IN THE SPACES PROVIDED

1) Why do shop stewards need to take notes?

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(2) When do you need to take notes?

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(3) Where do you record your notes?

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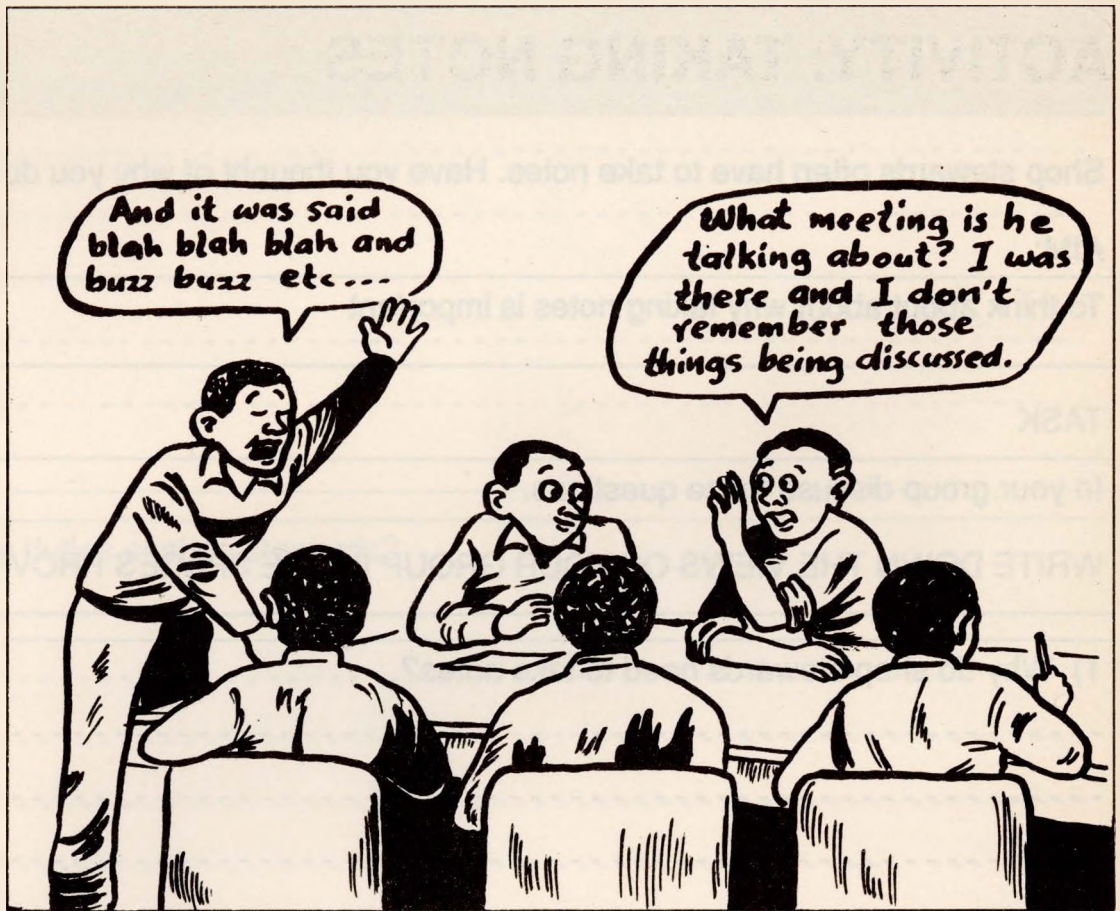
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**Taking notes  
is a way of  
making sure  
you remember  
important  
points**



## WHY DO WE NEED TO TAKE NOTES?

Taking notes accurately is one important way of making sure that our organisations are democratically controlled. This means that:-

- you can report decisions to and from meetings correctly
- you can know what mandates have been given to you
- you can meet deadlines and carry out decisions

## **OTHER IMPORTANT REASONS FOR TAKING NOTES ARE:-**

- to ensure that you remember important points
  - \* in meetings
  - \* in hearings or in interviews
  - \* from a newspaper or report
- to help with report-backs
- to write reports
- to note recommendations and decisions
- as a reminder of what work needs to be done
- for union records
- for later reference
- to write minutes
- to write letters

## **IF YOU DO NOT TAKE NOTES YOU MIGHT:-**

- promise to do something and then forget
- give a report-back and miss out important points
- write a report or minutes and miss out important points
- not be able to prove what decisions have been taken
- become lazy and inefficient, and thereby weaken our organisations

# ACTIVITY: SKILLS FOR TAKING GOOD NOTES

## AIMS

To discuss ideas for taking good notes

## TASK ONE

In your group read the notes below. They are not official minutes but they are still an example of bad notes.

Make a list of at least 8 points which you believe make these notes bad in the space at the bottom of the page.

### UNION MEETING

4.00pm

Simon X, John, Fred.

John reported on the sick pay problem. He said that Mrs Douglas from dispatch said that she had been to the office a number of times but their sick pay was not there. Also Local wanted to know about the overtime worked at the factory. Members to be informed about it. In machine shop - bad fumes problem - workers say they are being poisoned - also process workers complain about wk/ds - new Foreman new ideas!

Workers say ventilation to be checked upgrading case? Prepare? Research on new work methods? Need to gather information. Football match to be arranged between workers at ASEA electric and Chemco chemicals. Mfika to take responsibility. Request for solidarity from Commercial, Catering, and Allied Workers Union because 7000 workers on strike last week (See Star, Weekly Mail). Raise it with workers? John.

Meeting closed.

WRITE DOWN THE POINTS THAT YOUR GROUP BELIEVES MAKE THESE NOTES BAD

1. ....
2. ....
3. ....
4. ....
5. ....

- 6.-----
- 7.-----
- 8.-----

## TASK TWO

Compare these notes with the bad notes that you have already discussed.

Why are these notes better? Write down your points on the next page.

Shop stewards committee                      15/5/88  
Union office - Braitex                      3.00pm

Present: S Xaba. J Ndlovu. F Maxwell. J Meintjies. Z Xuma.

### 1. Sick Pay

Several complaints about sick pay not paid on time.

Action: Negotiating committee to raise with manag. at monthly meeting. All reps. to check if claims made in their department have been paid out.

### 2. Overtime

Request from BEC to report on overtime worked from 1/5/88 to 15/5/88.

Action: Agreed. All reps. to discuss with members and report at next shop stewards meeting.

### 3. Process workers - increased workloads

Complaint about increased workloads from new work methods.

Action: Com.Maxwell to ask for meeting with personnel. Process shop stewards to prepare case to recommend upgrading.

### 4. Machine Shop Fumes

Complaints of fumes from solvent tank in machine shop. Need to test atmosphere and ventilation system.

Action: Mr Xuma to raise immediately with management.

## 5. Things for all shop stewards to do

- check overtime worked arrange members meeting
- check if any members have problems with sick pay

WRITE DOWN YOUR GROUP'S POINTS ON WHY THESE NOTES ARE BETTER

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## HERE IS AN EXAMPLE OF HOW TO LAY OUT YOUR NOTES

Name of meeting - .....

Date.....

Time.....

Venue.....

Attendance - Present:

Issue - 1.....

Action to be taken - **Action:**

- 2.....

- **Action:**

- 3.....

Who is responsible for action eg. - **Action:** Com. Maxwell to ask for meeting with personnel.

- 4.....

Decision eg. - **Action:** Com. Xuma to raise immediately with management

Follow up - **Things to do**

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# HOW TO TAKE USEFUL NOTES

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We all develop our own methods of taking useful notes. But there are some points that can help us. For notes to be most useful, they should be

SELECTIVE  
CONCLUSIVE  
WELL LAID OUT  
BRIEF

## BE SELECTIVE

Notes are only useful if they are short, to the point and record only essential information. The essential information is:-

- \* the date
- \* the type of meeting
- \* names of people involved
- \* where the meeting happened
- \* the facts

In most cases you can leave out opinions and different points of view. But in long and important debates it is useful to record the main positions and the outcome and sometimes important differences.

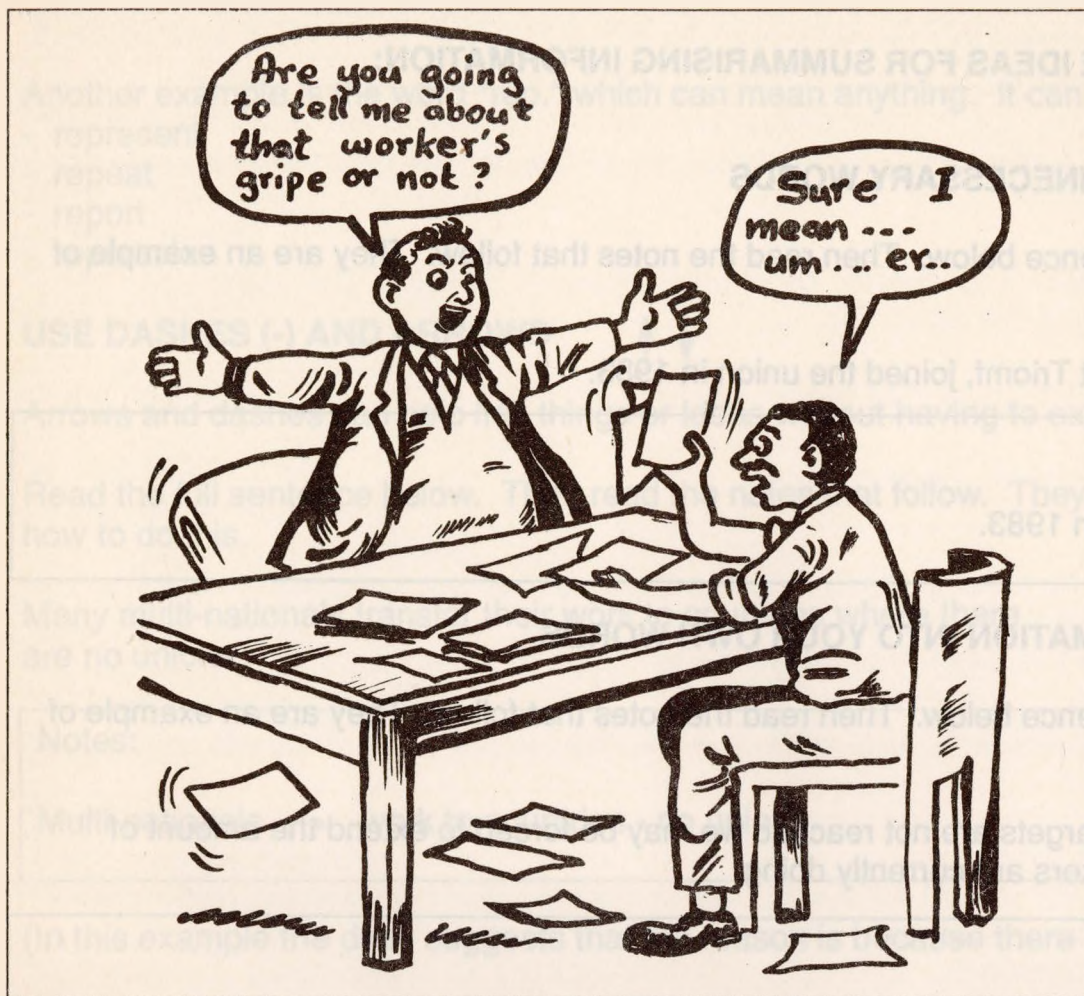
## BE CONCLUSIVE

A very common problem is to come out of a meeting, and not be clear about what was decided. So all notes must lead somewhere. Make sure yours do. You must note:-

- \* decisions reached
- \* recommendations made
- \* agreements with management
- \* action to be taken -
  - by whom and
  - by when

Sometimes you need to keep notes of the actual words spoken. This should be

- \* when there is an agreed form of words in a meeting eg. when there is a resolution or an agreement with management
- \* when you are taking a statement from a witness eg. in an accident or when you need an exact record
- when management makes a commitment to do something
- when management refuses to agree to workers' demands



Notes that are clearly laid out are much easier to understand and follow

## BE WELL LAID OUT

Have you ever looked at your notes or someone else's and not understood them? Notes that are clearly laid out on a page are easier to understand and follow. It is easy to pick out the important information quickly.

When you take notes you should:-

- \* break up notes by using paragraphs, numbers, and headings
- \* highlight key words and points - use underlining, capitals, colours and boxes
- \* leave plenty of space between your notes to allow you to add other notes on that subject

## BE BRIEF

As we have said there are different ways of taking useful notes. But you cannot take useful notes if you try to take down everything that is said, because you will definitely miss some important details. You need to develop ways of summarising your notes without losing the meaning. This is very important because you have to use your notes when handling grievances or disputes etc. If your notes are not clear it will be difficult to argue the union's case effectively.

## HERE ARE SOME IDEAS FOR SUMMARISING INFORMATION:

### CUT OUT ALL UNNECESSARY WORDS

Read the full sentence below. Then read the notes that follow. They are an example of what to do.

We, the workers at Triomf, joined the union in 1983.

Notes:

Triomf joined union 1983.

### PUT THE INFORMATION INTO YOUR OWN WORDS

Read the full sentence below. Then read the notes that follow. They are an example of what to do.

If our production targets are not reached we may be forced to extend the amount of overtime that workers are currently doing.

Notes:

Man. wants to increase overtime.

### USE ABBREVIATIONS

There are many standard abbreviations. Use these as much as possible.

For example: South Africa = S.A.

International Union of Foodworkers = IUF

government = govt

that is = i.e.

for example = e.g.

Make your own abbreviations e.g. recognise = recog.

work = wk.

When you are making your own abbreviations, **don't shorten words so much that you can't remember what the word was**, because you will then have problems later on when you try to use your notes, for example, when handling a grievance.

For example the word "inter" can mean anything. It can mean:

- inter-union solidarity
- inter-department solidarity

Another example is the word "rep." which can mean anything. It can mean:

- represent
- repeat
- report
- repression

## USE DASHES (-) AND ARROWS



Arrows and dashes can help link things or ideas without having to explain the link fully.

Read the full sentence below. Then read the notes that follow. They are an example of how to do this.

Many multi-nationals transfer their work to countries where there are no unions.

Notes:

Multi-nationals → work to countries - no unions.

(In this example the dash suggests that the reason is because there were no unions.)

You can use arrows to replace words. For example:

Increase = ↑

decrease = ↓

You can use plus and minus signs in different ways. For example,  $\pm$  = about (approximate numbers) or 15 workers dismissed = -15 workers.

We can use dashes to replace small words like in, at, with.

## DON'T REPEAT THE NAME OF A PERSON WHO IS DOING THE ACTION

Read the paragraph below. Then read the notes that follow. They are an example of how to do this.

Ford management was alarmed by this international solidarity. Management made plans to destroy our union in Brazil. Management slowed down the plant in Rio de Janeiro. They transferred the work to other areas of the country.

Notes:

Ford management alarmed by international solidarity. Plans destroy union - Brazil.  
Slowed down plant - Rio de Janeiro. Transferred work - other areas of country.

## DON'T REPEAT SENTENCES WHICH REALLY JUST SAY THE SAME THING

Read the paragraph below. Then read the notes that follow. The notes are an example of how to do this.

Government repression was severe. Eight unionists were banned. The union was crushed by the army of the dictators.

Notes:

Govt. banned 8 unionists - crushed union.

In this case there is no need to say that "repression was severe" because the banning and crushing show us that the repression was severe. We can leave out reference to the army of dictators because this doesn't add anything essential to the notes.

## TRY TO KEEP IN WORDS WHICH GIVE A STRONG FEELING OF ACTION

For example:

- workers saved 350 jobs
- union crushed
- management forced to recognise union
- must stand up to bosses

**We can summarise what we have said so far in this way. To take useful notes think of the DATA you need.**

- |          |                    |          |                                                                                                                                                                                                                                       |
|----------|--------------------|----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>D</b> | <b>- Details</b>   | <b>-</b> | <b>Who was present?<br/>When - date, time<br/>Subject - Is there an agenda to attach?</b>                                                                                                                                             |
| <b>A</b> | <b>- Agreement</b> | <b>-</b> | <b>What exactly was agreed?<br/>Was it a decision or recommendation?<br/>Did you check back on notes of any agreements made at previous meetings?</b>                                                                                 |
| <b>T</b> | <b>- Title</b>     | <b>-</b> | <b>Space your notes out clearly.<br/>Use titles and headings to highlight points<br/>List points and leave space to add information later.</b>                                                                                        |
| <b>A</b> | <b>- Action</b>    | <b>-</b> | <b>Always note down any action points which are agreed.<br/>Who is responsible for the action, when? If you must do something remember to remind yourself in some way.<br/><br/>Make sure you check on these action points later!</b> |

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# PRACTISING NOTE-TAKING SKILLS

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We have said for notes to be most useful, they should be

SELECTIVE  
CONCLUSIVE  
BRIEF  
WELL LAID OUT

In the next part of the booklet there are many exercises to help you practise these skills.

## **TO BE SELECTIVE**

There are exercises on:-

- \* identifying main points
- \* identifying main points and supporting arguments

## **TO BE CONCLUSIVE**

There are exercises on:-

- \* identifying the difference between decisions, recommendations and discussion

## **TO BE BRIEF**

There are exercises on:-

- \* writing down key words to help you remember full points

## **TO BE WELL LAID OUT**

There are exercises on:-

- \* using plans, prepared beforehand, to take notes

Then there are exercises on:-

- \* using these skills to take notes in union meetings and meetings with management

Finally there is an exercise to consolidate the various skills involved in taking notes.

# ACTIVITY: IDENTIFYING MAIN POINTS WHEN TAKING NOTES

## AIMS

- To help you see why it isn't necessary to take down every word when you take notes
- To help you identify main points and write these down

## TASK ONE

The passage below comes from the Secretariat Report to the COSATU Special Congress held on May 14/15, 1988.

Read the passage. Then discuss the main points of the passage and write them down. Discuss your answers in the group.

"The State of Emergencies severely weakened organisation. So why did the state need to ban 17 organisations and restrict the activities of COSATU? Maybe the state didn't want the military occupation of the townships to carry on for too long. The state knows that liberals find it more difficult to support them if the repression is too bad. The state also knew that there was growing unity among democratic forces through the adoption of the Freedom Charter and possible joint campaigns (e.g. the coming municipal elections, the campaign against the restriction of Mbeki, Save the Patriots, LRA and Living Wage Campaigns etc.) The state was worried that this growing unity would strengthen the organisation.

The state wants to be able to rule without the State of Emergency. But the state can only do this if the democratic movement is destroyed and they can win the support of the liberals. So the state needed to attack the unions and the rest of the democratic movement before this growing unity of the democratic movement had time to develop.

In January the state acted quickly to try to end the national crisis in township schools by banning meetings of the NECC. In March after the bannings, they wasted no time in banning the newly formed human rights organisation, Defence of Democracy."

WRITE DOWN WHAT YOU THINK ARE THE MAIN POINTS

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# ACTIVITY: IDENTIFYING MAIN POINTS WHEN TAKING NOTES

## TASK TWO

The next exercise involves trying to identify the main point of what management is saying as you listen to management talking.

The purpose of the exercise is to develop the skills of only writing down the main points as you listen to what people are saying. And not to try and write down everything.

To do this, it sometimes helps first to listen and then to write.

Get one person in the group to read the passage below aloud to the rest of the group.

The other people in the group must not read the passage. You must just listen and then write down the main points.

### Passage

"I would like to say that at this point in time, the company is not at all happy about what is happening in this factory because as you are all probably quite aware, production targets have dropped considerably over the past few months. If this situation continues, we will not be able to grant you your three days paid education leave because we feel that it is all this union activity that has led to this situation."

### WRITE DOWN THE MAIN POINTS

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WHEN YOU HAVE WRITTEN DOWN THE MAIN POINTS DISCUSS YOUR ANSWERS  
IN YOUR GROUP

# ACTIVITY: IDENTIFYING MAIN POINTS AND SUPPORTING ARGUMENTS

## AIMS

You often have to take notes in long debates or make notes of long reports.

It is not necessary to take down every word. You only need to take notes of the main positions and the supporting arguments (arguments to back up the position).

The aims of this exercise are to:

- Help you identify main points and supporting arguments
- Develop the skill of writing down only the really important information

## TASK

There are different ways of taking notes of main points and supporting arguments. One way is first to listen to what is said, and then write notes. Or you can try to pick out the main points and supporting arguments as you listen. In both cases you mustn't try to write everything down because you will definitely miss some essential information.

To do this exercise get one person in the group to read out the passage below.

The passage comes from the Secretariat Report to the Special Congress of COSATU, 1988. The rest of the group must listen and take notes.

If you are doing the exercise on your own, read the whole passage first. Then write your notes.

## Passage

"The declaration of the State of Emergency changed the conditions and intensified the attack on the democratic movement. We need to critically look at our past strategies and see what changes we need to make. Otherwise the militancy of our people won't be properly directed. And we will not be able to survive the attack.

This does not mean that we sit back and do nothing. Nor does it mean that we can only take up factory issues. Because our movement is not defeated. Nor has the heroic resistance of our people been crushed. But to go forward we need to change some of our strategies and re-organise the lines of resistance."

Blank handwriting practice paper with horizontal dashed lines.

Blank lined paper with horizontal ruling lines.

## Taking Notes

# ACTIVITY: USING KEY WORDS TO REMEMBER FULL POINTS

## AIMS

To help you

- See why you don't need to take down every word when you take notes
- To give you practice in summarising

## TASK ONE

Below is a full, but short, story about the 1973 Durban strikes.  
On the next page you will see the same story but many words have been left out.

Choose one person in your group to read the story on this page out loud twice.  
The rest of the group must not look at the copy of the full story while the person is reading the story.

You must look at the copy with the missing words on the next page.  
When the person reads the story the second time the rest of the group must fill in the missing words on the next page.

## The full story

In 1973, workers in Durban came out on strike. The bosses and the government were taken by surprise - nothing like this had happened for many years. The 1973 strikes are important because they marked a break with the "quiet 1960's". In the 1960's, the ANC and the South African Communist Party were banned, and the South African Congress of Trade Unions was no longer able to function. The mass resistance of the 1950's was a thing of the past. The early 1970's brought much unemployment. Prices of basic foods and transport were rising, while wages did not increase. In January 1973, 2000 workers at the Coronation Brick and Tile factory in Durban came out on strike. They were demanding a wage increase from R8,97 to R30 a week. Like a fever, the strikes spread to other factories. After the strikes, workers began to join the General Workers Benefit Fund. The fund had different divisions for different industries. Once there were enough members from one industry, an industrial union was set up. In 1975, these unions came together to form a small Natal-based union federation called the Trade Unions Advisory and Co-ordinating Council.

---

LISTEN TO THE STORY BEING READ AGAIN AND FILL IN THE MISSING WORDS AS YOU LISTEN.

In ....., workers in ..... came out on ..... The bosses and the government were taken by surprise - nothing like this had happened for many years. The 1973 strikes were important because they marked a ..... with the ..... In the 1960's the ....., and the ..... were ....., and the ..... was no longer able to function. The mass resistance of the 1950's was a thing of the past.

The ..... brought much ..... were ....., while .....

In January 1973, ..... at the Coronation Brick and Tile factory in Durban .....

They were demanding a ..... from R8,97 to R30 a week. Like a fever, ..... to other factories. After the strike, workers began to join the ..... The fund had different divisions for different industries. Once there were ....., an ..... was set up. In ....., these unions came together to form a small Natal-based federation called the .....

### TASK TWO (Group or individual activity)

Write down all of the words you have filled in on the previous page.

Note: If you are working on your own, you can do this exercise by looking at the full story and filling in the missing words. Then you can write down the words you have filled in, sentence by sentence.

WRITE DOWN YOUR NOTES OF THE MISSING WORDS

1973, Durban, strike.

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### TASK THREE

As you can see from your summary on page 28, you can leave out a lot of words when you take notes. You only need to write down the really important words. You can then use a few words to remember full sentences later on, for example, when you are planning your report back.

Look at your summary on page 28 and see if you can leave out even more words to make a really short summary.

**WRITE DOWN YOUR NEW SUMMARY HERE**

Blank lined paper with horizontal ruling lines.



It is important to be clear about the difference between decisions and recommendations

## ACTIVITY: IDENTIFYING THE DIFFERENCE BETWEEN RECOMMENDATIONS, DECISIONS AND A DISCUSSION

### AIMS

You often have to take notes in meetings where it is very important to record the outcome of a discussion. This involves being able to listen to a discussion and pick out the decisions and recommendations.

It is also important to be clear about the difference between decisions and recommendations.

When a **decision** is reached, action based on the decision can happen immediately. When a **recommendation** is made, some further discussion must happen before a decision can be made.

The aims of these activities are:-

- To develop the skill of listening to a discussion and picking out **decisions** and **recommendations**
- To practise identifying the difference between **decisions** and **recommendations**

## TASK ONE

Read the record below of part of a meeting with management.  
Pick out (a) a decision and  
(b) a recommendation

and then write these down.

Then read out your answers to the rest of the group. Discuss the reasons why you made the choices that you made.

**UNION:** The forklift drivers are complaining that their grade is too low. It is grade 4, the same as operators. They request to be put one grade higher.

**MANAGEMENT:** We follow a grading system which was compiled specially for the rubber industry by experienced people following a scientific manner of job analysis. All factories in the rubber industry follow this grading system - therefore we cannot alter it as we haven't got that knowledge and because if we do we will place ourselves outside the industry.

**UNION:** We do not accept your point. We want the job descriptions of forklift drivers and operators by the next meeting. And again, the forklift drivers should get belts like other drivers?

**MANAGEMENT:** That issue can get raised through the safety representative who can raise it at the safety meetings as it is a safety issue.

**UNION:** We have another problem. The 21st Dec. is on a Wednesday. Can we not stop on a Friday and start on a Monday, instead of stopping on a Wednesday and starting on a Thursday?

**MANAGEMENT:** What is the problem with that?

**UNION:** It is the pay, we will only get pay in that week for one or two days and not for a full week.

**MANAGEMENT:** We can keep enough wages for each person behind to enable him to get a full week's pay when he comes back - that is not a problem.

WRITE DOWN ONE DECISION

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WRITE DOWN ONE RECOMMENDATION

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## TASK TWO

Study the statements below. For each statement write down if it is a decision or a recommendation.

a) The NEC has approved expenditure for a vehicle to be brought for the Transvaal region.

.....

b) The BEC has terminated the membership of Mr Z. Meintjies with immediate effect because he embezzled funds from the union office.

.....

c) The local felt that COSATU should embark on a campaign to win 15 days paid leave for all shop stewards to attend union education seminars. The matter was referred to the regions.

.....

### TASK THREE

Think about your recent union activities.

In the boxes below write down one decision and one recommendation that you have been involved in.

a) A decision

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b) A recommendation

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DISCUSS YOUR ANSWERS IN THE GROUP AND THE REASONS WHY THE FIRST ONE IS A DECISION AND THE SECOND ONE IS A RECOMMENDATION.

#### **Note:**

It is a good idea to develop your own way of writing down things that you have to do after the meeting.

Some people write a star (\*) next to the points they must follow-up. Other people make a separate list of the jobs they must do.

This is very important because it is easy to forget after a meeting is over.

# ACTIVITY: TAKING NOTES IN UNION MEETINGS

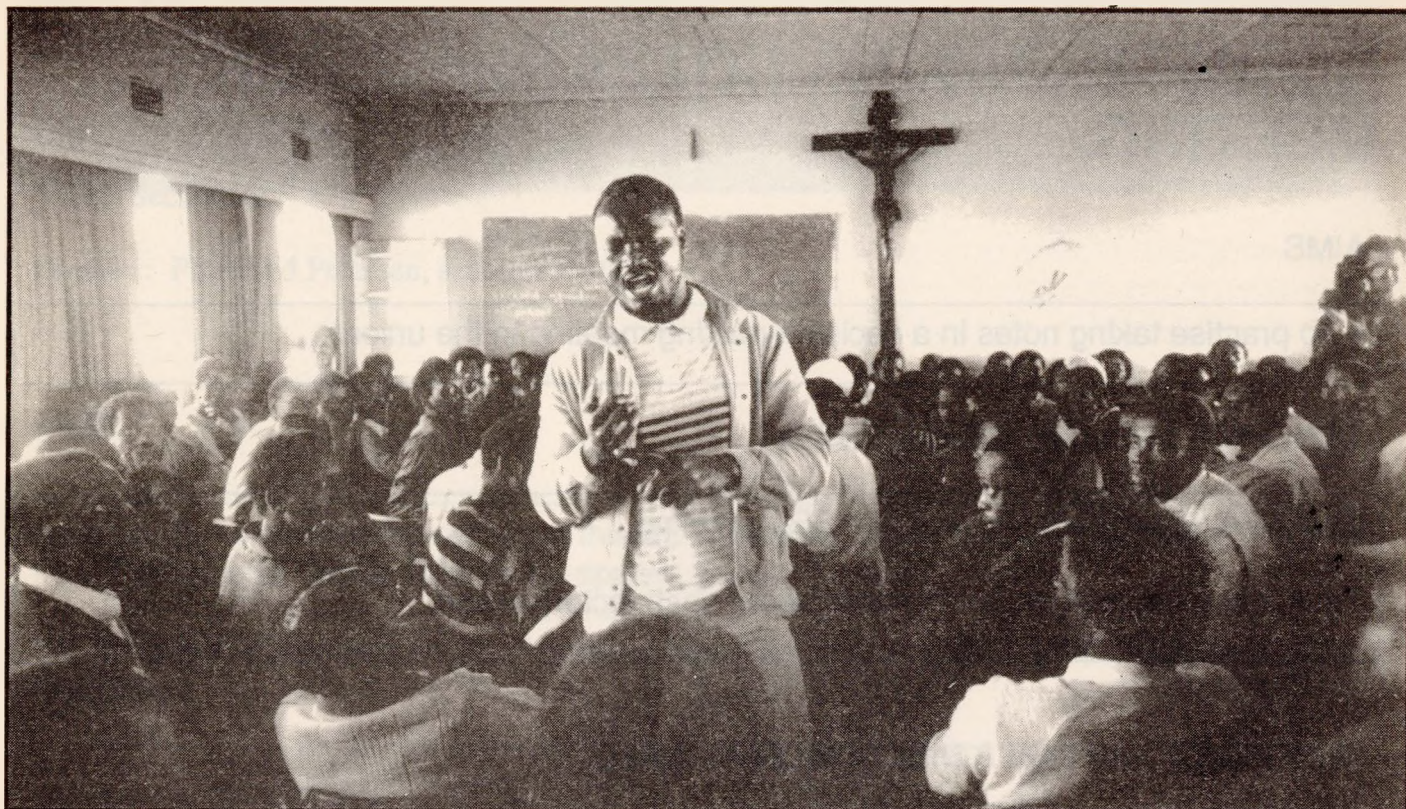
## AIMS

- To develop your understanding of the purpose of all the different meetings in the union
- To relate the skills of taking notes and minutes to the purpose of the meetings

## TASK

In your group list all the different kinds of meetings that take place regularly in your union. Then discuss the main functions of each meeting and write these down next to the particular meetings.

| NAME OF MEETING | FUNCTIONS |
|-----------------|-----------|
| .....           | .....     |
| .....           | .....     |
| .....           | .....     |
| .....           | .....     |
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**You need to take good notes if you want to be able to give proper report-backs to workers**

## **TAKING NOTES IN UNION MEETINGS**

All unions have meetings where workers from different factories in a branch or area come together to make decisions for the union, to plan union strategies, and to make recommendations to the union nationally, to report on the activities of the union and the federation, and to discuss matters that affect the union movement as a whole.

In some unions these meetings are called Branch Executive Committees (BEC's), and in other unions these meetings are called Local meetings.

These meetings are attended by some or all the shop stewards from particular factories. At these meetings you the shop stewards represent the views of the workers in your workplaces. To do this you need to get mandates from the workers before you go to the meetings. And you need to report back to workers after the meetings so that workers know what's happening in their union and can participate in making decisions about the union.

**To make sure that you give proper report-backs to workers in your workplace, and that you don't forget important details, you need to take good notes in union meetings.**

# ACTIVITY: TAKING NOTES IN A UNION MEETING

## AIMS

- To practise taking notes in a decision-making meeting in the union

## TASK ONE (Group or individual activity)

Study the record below of part of a BEC meeting.

Then make notes of the main points about each factory report.

## RECORD OF PART OF A DISCUSSION AT A BEC

Dlamini: Alright, if the house agrees then we can move onto factory reports. Can we hear from Frametex?

Ntuli: Well at our factory things are not so good. Because of the deadlock over recognition and wages we will most probably have a legal strike starting 30th September. We are having a ballot on the matter in the factory on the 25th August.

Dlamini: Any questions, no? Can we now have the Coates report.

Mokoena: At Coates we have some good news. We have won a case for unfair dismissal. If you remember last year Jane Skhosana was fired for theft. She has been reinstated with back pay which is about R3 000.

Petersen: We are very happy to hear this.

Dlamini: Can we now have the Cotton Dust report.

Petersen: We have a serious problem. Our company has given notice that it is to shut the Germiston factory and relocate in Boputhatswana. 200 workers will be retrenched. The management is refusing to discuss the issue - in fact we were in the middle of our negotiations when this happened. Our shop steward committee has asked the BEC to consider this very serious matter to give some guidance on what we should do.

Dlamini: You know we had a similar matter in one of our factories in Natal. I will ask Sis Jacobs to remind us and see how we can assist Cotton Dust.

Sis Jacobs: Thank you com. chair. Well what we did at Consolidating Spinning in Durban does apply here. I think we have sufficient grounds to launch an urgent application under Sect. 43 of the Labour Relations Act for the reinstatement of retrenched members or for any other relief.

Petersen: I support the idea of a legal application. I think Sis Jacobs should also be authorised to sign all necessary documents.

Ntuli: Seconded.

Dlamini: Proposed Petersen, seconded Ntuli.

## TASK

Now you have studied the record of this BEC meeting, make notes on the factory reports from Coates and Cotton Dust in the spaces provided below.

We have included notes on the Frametex report as an example of what the notes should look like.

## EXAMPLE OF NOTES:

Frametex: ballot - 25th August for legal strike. Start 30th September - recognition and wages.

## OTHER NOTES ON FACTORY REPORTS

Coates:

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Cotton Dust:

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TASK TWO (Group Activity)

Imagine that you are all attending a BEC or Local meeting.

Each workplace must give a report. The other people in the group must take notes as they listen to the reports.

After all the people in the group have given their reports, break up into pairs and discuss the notes that you have taken.

Remember your notes must be very brief. They must only cover the main points.

WRITE DOWN YOUR NOTES HERE

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# ACTIVITY: TAKING NOTES IN MEETINGS WITH MANAGEMENT

## AIM

- To help you see the importance of taking notes in meetings with management

## TASK

Discuss the questions below in your group. Write down the points raised in your group.

1. Why do shop stewards need to take notes in meetings with management?

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2. Is it okay to rely on management minutes for records of meetings with management?

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**How do you handle meetings with managements?**



3. How does management use language to try and control meetings with shop stewards?

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4. When you take notes in meetings with management, what problems do you have?

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# TAKING NOTES IN MEETINGS WITH MANAGEMENT

Workers need to take notes in meetings with management to ensure that all decisions are correctly recorded.

If you take notes in meetings, you can write your own minutes after the meeting.

This will help to ensure that the union has its own record of the meeting. If this is done you won't need to rely on minutes drawn up by management.

You will then be able to avoid problems that can arise if, for example, management has left things out or has changed things.

Sometimes you need to record exactly what management says in a meeting so that you can refer to these things at future meetings.

If you have taken your own notes, it will be easier to challenge management when they try to change what has been agreed at previous meetings.

## **Some ideas on how to take notes in meetings with management.**

English is probably not your first language and so it isn't easy to take notes in meetings that are conducted in English. We have included some points below to help you.

- 1. Don't try to follow every word that management says. Rather listen out for the really important points.**
- 2. Listen out for words that suggest a decision or recommendation.**
- 3. Listen out for management's responses to your demands.**
- 4. Remember you should always interrupt and ask management to repeat or clarify what they are saying if you are not sure.**
- 5. Always:**

**Study the agenda before the meeting.**

**Write down the unions demands under each item.**

**Leave a space to write down what was decided about each item.**

**Listen and concentrate on picking out words that suggest a decision or recommendation.**

Below is an example of how you can use an agenda for a meeting with management to prepare for taking notes.

Agenda for meeting between management and shop stewards on 1st September, 1988.

1. Opening
2. Apologies
3. Minutes
4. Matters Arising
5. Overtime
6. Retrenchment
7. Full-time shop steward

### HOW TO PREPARE TO TAKE NOTES FROM AN AGENDA

Shop steward/management meeting                      1/9/88  
10.00am  
Management Office

Present:.....

2. Apologies

3. Minutes

4. Matters Arising

5. Overtime

Demand: .....

Action: .....

6. Retrenchment

Demand: .....

Action: .....

7. Full-time shop steward

Demand: .....

Action: .....

# ACTIVITY: TAKING NOTES IN A MEETING WITH MANAGEMENT

## AIM

- To practise skills of taking notes in meetings with management

Note: If you are working in a large group do TASK ONE.

If you are working in a small group, or on your own, do TASK TWO.

## TASK ONE

Choose five people to read the different parts in the script on the next page of a meeting with management. They should read the whole script twice.

The parts are:-

The General Manager  
The Personnel Manager  
A shop steward  
The senior shop steward  
The union organiser

The rest of the group must take notes as the script is read.  
Don't look at the script while you listen.

When you take notes pay special attention to:  
the union's demands and management's responses to these demands.

You must also record the union's responses to:  
any suggestions of management or recommendations by management.

We have included a copy of the agenda for the meeting which can help you plan how you are going to take the notes. (on page 44)

## TASK TWO

Study the record on the next page of a meeting with management.  
Make notes of the union's demands and the decisions about each demand.

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## AGENDA

### AGENDA FOR MEETING BETWEEN N.U.T.W. AND SLAVINS TO BE HELD ON 21 JULY 1987.

1. Present
  2. Apologies
  3. Minutes
  4. Matters Arising
  5. Recognition for collective bargaining
  6. Recognition for representation
  7. Stop orders
  8. Elections
  9. Education
  10. Meetings
- 

General Manager: Good afternoon. I believe that you know Mr Smith, our Personnel Manager.

The objective of this meeting is to resolve the outstanding items of the previous meeting. I believe that we are in agreement that no new items of business will be raised at this specific meeting.

Personnel Manager: You have all been circulated with copies of the previous minutes. Are these accepted as correct?

Shop steward: We have no changes to make.

Personnel Manager: Well we can proceed with the meeting then.  
Our company has agreed to the following:  
(i) recognition of NUTW for the purposes of collective bargaining.  
(ii) recognition of NUTW for the purposes of representation of members in disciplinary and grievance hearings. It is felt that the specifics of those hearings can be ironed out after the signing of the recognition agreement.  
(iii) the deduction of stop orders and the payment on a monthly basis of monies to NUTW.

Senior shop steward: I suggest that we begin today's discussion with the questions of the election and number of shop stewards. We are requesting 6 shop stewards.

General Manager: That's absurd. As you are aware, we have a number of agreements with your union on this issue and we have never conceded more than 2 shop stewards in any of our factories.

Union  
organiser: Yes, but the situation at other factories is that they are relatively small. This factory has 300 workers. That is why we suggest that in this factory we have 6 shop stewards - one shop steward for every 50 workers.

General  
Manager: We will discuss your proposal with our legal adviser.

Shop  
steward: When will you give us a reply?

Personnel  
Manager: At the next meeting. Now how do you propose that these shop stewards would be elected?

Union  
Organiser: In accordance with our union's constitution. We would however like to hold the elections on the company's premises.

General  
Manager: We all know about so-called democratic procedures in unions. So we feel if we are going to grant permission for elections to be held on company premises we feel we have a right to see that these are conducted in a reasonable manner. We would therefore wish to appoint someone to monitor the elections.

Shop steward: This will have to be referred back to our members.

Personnel  
Manager: Can we move on to meetings? I believe that Mr Peacock has some points he wishes to make.

General  
Manager: It is totally unacceptable that meetings be held in the firm's own time. I have a responsibility to the company for production targets - which we have consistently failed to meet because of the action of your union. We never had this problem before.

Union  
Organiser: That is why we are meeting today to ensure that the situation can be resolved.

Shop steward: Our meetings are important - we need a mandate from our members.

Senior  
shop steward: One meeting per month for 2 hours is not unreasonable.

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**General Manager:** Do you know how much production we will lose in 2 hours?

**Personnel Manager:** This needs to be discussed further. We will have to leave it on the table.

**General Manager:** The other point outstanding is the question of leave for union activities. We cannot accept 5 days leave. We will allow shop stewards to take 4 working days paid leave per annum in the first year, and 3 days in any year thereafter.

**Shop steward:** Your proposal is acceptable to us.

**Senior shop steward:** We suggest that meetings with management are held at the request of the senior shop steward.

**General Manager:** But what if we want to arrange a meeting with the shop stewards?

**Union organiser:** Perhaps further meetings could be held at management's discretion provided there are good reasons and shop stewards are notified of these at least 2 days before the proposed date for the meeting.

**General Manager:** We have no problems with that.

**Personnel Manager:** Well, if there are no further items, I declare this meeting closed.

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WRITE YOUR NOTES HERE:

# ACTIVITY: CONSOLIDATING WHAT YOU HAVE LEARNED ABOUT TAKING NOTES

## AIMS

- To practise using the skills involved in taking notes

## TASK:

At your last shop stewards committee you were mandated to get information on the O.K. strike.

You have to make a brief report to your next shop stewards committee meeting. You have found an article in a union newspaper (see below) which covers the main points of the strike.

1. Read the article
2. Summarise the main points of the article in brief notes under the headings on the next page.

## O.K. WORKERS WIN A MAJOR STRIKE

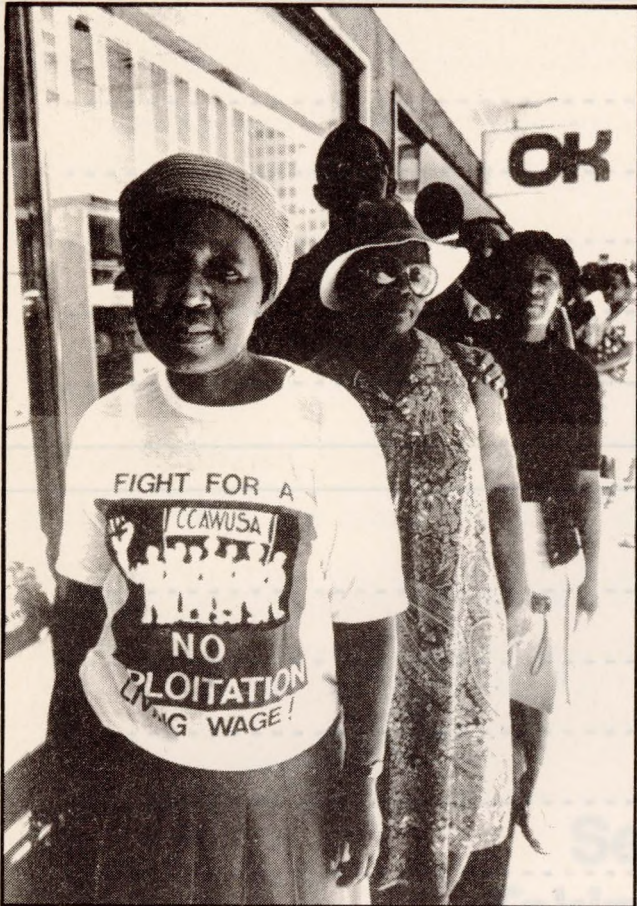
On December 18 last year, the Commercial Catering and Allied Workers Union (CCAWUSA) announced a strike of O.K. Bazaars workers. By the time the strike ended, 10 weeks later, 10 000 workers had been on strike at 120 O.K. outlets throughout the country. Moreover, workers had won a R100 increase and an increase in staff discounts.

O.K. Bazaars workers were paid very low wages, with some workers earning less than R300 a month. Also the union was aware that the company had made a R237,000 profit in the financial year ending March 1986.

The union's major demands were a R160 per month across the board increase, covering the period April 1986 to March 1988, R450 per month minimum wage, and staff discounts of 20% on purchases instead of the present 10%. Other demands were that workers in Bantustans should receive the same increases, workers on maternity leave should receive the same increase in their wages, the unconditional reinstatement of those dismissed during the strike, and the reinstatement of benefits withdrawn during the strike e.g. the 1986 bonus and withdrawal of privileged leave.

Management tried to break the strike - 551 workers were sacked and 1000 others detained. But the workers stood together. Community organisations and COSATU, the biggest federation of unions, backed the striking O.K. workers.

When the strike ended, O.K. agreed that it would keep the jobs of workers in detention. The cases of the 258 workers dismissed during the strike would be reviewed. Jay Naidoo, General Secretary of COSATU said:



**The OK strike: Community organisations and COSATU backed the strikers**

"The workers had received no strike pay and yet had remained solid and united. The strike had also built inter-union solidarity e.g. FAWU refused to handle goods destined for O.K."

"The determination, courage and sacrifice of a great number of the O.K. workers ensured the victory over the O.K. bosses."

WRITE YOUR NOTES IN THE SPACES PROVIDED

THE PROBLEM

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### THE UNION DEMANDS

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### UNION ACTION

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### MANAGEMENT - UNION SETTLEMENT

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### WHAT LESSONS ARE THERE FOR WORKERS FROM THE STRIKE?

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## Section 2

### Taking Minutes

# ACTIVITY: TAKING MINUTES

Minutes are an official record of all the business done at a meeting. They include:

- a summary of reports
- the main positions in debates
- essential information.

They must include a record of all decisions taken.

**Minutes help to make sure that there is follow-up on decisions and other activities.**

Minutes are based on notes taken in meetings. People usually write up the minutes properly from their notes after the meeting.

## AIMS

- To help you improve your ability to write minutes

## TASK ONE

In groups, study the minutes below. They are an example of bad minutes.

Make a list of at least 10 points which say why the minutes are bad. The questions below can help you think about some of the problems.

- Are they clear?
- Are they easy to read?
- Have they left out any essential information?
- Have they included the right information?
- Are the decisions clear?
- Do they say "what" "when" "why" "who"

## HERE IS AN EXAMPLE OF BAD MINUTES

Agenda

10/7/88

1. Opening.
2. Apologies
3. Minutes and Matters Arising.
4. Annual Conference Report
5. Factory reports
6. Correspondence
7. Announcements

Apologies were read and accepted. Minutes were not true and the minutes were shifted to the next meeting.

### Annual Conference Report

Some comrades didn't attend the meeting due to some problems at home.

### Boots Report

The house was asking about the harrassment or intimidation from the manager. Harrassment from the SAP. SAP are busy arresting comrades at Boots. So workers asked the management about the comrades who were arrested. The management said to the comrades the police do the job. A worker suggested a letter must be drafted to the Head Office. And the house asked one organiser if they ever discussed the harassment of workers with the management.

### TESCO Report

Comrades said they didn't know what was happening about their demands to employers. The last meeting was in June. The meeting decided that the question of lost wages must be raised.

### SAINSBURY Report

National Wages and Job Grading within 2 weeks

### Correspondence Report

Correspondence was read. It was from COSATU. One comrade suggested that the minutes can be photostated so that all workers can have copies.

### Announcements

- General meeting COSATU
- Women workers meeting 8h00 to leave for Saratoga.

MAKE A LIST OF THE POINTS ON WHY THE MINUTES YOU HAVE JUST READ ARE BAD

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_

## TASK TWO

Compare the minutes below with the bad minutes on page 52 and 53.

Why are these minutes better? Write down your points below. Discuss these questions before you read the minutes.

- What are minutes used for?
- What kind of information must we include in minutes?
- What information can be left out?
- How should minutes be laid out?

### HERE IS AN EXAMPLE OF GOOD MINUTES

Minutes of the B.E.C. meeting held on 1/7/88 in Johannesburg

#### Agenda:

1. Opening
2. Attendance
3. Apologies
4. Minutes
5. Matters Arising
6. Reports
7. Correspondence
8. General

The meeting was opened at 11.00am by the chair.

#### 2. Attendance:

As per attendance register

#### 3. Apologies

Apologies were read from L B Davey, R Kron, Marks Brothers, and J R Dallas.

#### 4. Minutes of the last meeting were accepted.

Proposed: J Ndude

Seconded: S Ndlovu

#### 5. Matters Arising:

5.1 Provident Fund: A national Anglo shop steward council was held to look at the Provident Fund. A report will be tabled at the next meeting.

5.2 Health and Safety reps: A regional seminar for such shop stewards will be held on 25th July 1988.

5.3 D & JB: Opinion is that the case has merit. Lawyers are trying to get finance. If not, report on costs will be given to Branch so this can be referred to NEC.

## 6. Reports:

- 6.1 Tesco: 7 workers were arrested at the factory. They are being charged with intimidation. Out on bail. S. Maitse to arrange for lawyer.
- 6.2 D J Edwards: Problems. Company to lay off some people as from Monday 10th July. General meeting on Sunday.
- 6.3 R Isaacs: Stoppage reported. Gen Sec. and shop stewards to meet with management on Friday.

## 7. Correspondence:

- 7.1 Telex from T & GWU inviting us to their national congress on 6 & 7th August. Delegates chosen to attend.
- 7.2 Letter from COSATU Reg. Sec. re: Special REC. Delegate chosen to attend.

## 8. General:

The women's meeting postponed to 15/7/88.  
The meeting closed at 5.45pm  
Next B.E.C. on 2nd August, 1988

MAKE A LIST OF THE POINTS ON WHY THESE MINUTES ARE BETTER THAN THE BAD MINUTES YOU HAVE ALREADY DISCUSSED

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_
- 6. \_\_\_\_\_
- 7. \_\_\_\_\_
- 8. \_\_\_\_\_
- 9. \_\_\_\_\_
- 10. \_\_\_\_\_

Are there any ways that these minutes could be improved?

Note: Study your points above. They can help you write good minutes.

## SUMMARY:

### WHAT DO WE WRITE IN THE MINUTES? HOW DO WE WRITE MINUTES?

|                                                                                                                |                                                     |
|----------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| - Name of meeting                                                                                              | COSATU REC                                          |
| - Place                                                                                                        | Held in the Western Cape                            |
| - Date (When)                                                                                                  | on 23rd November, 1988                              |
| - Who was there                                                                                                | 1. Attendance                                       |
| - Who was not there but should have been there                                                                 | 2. Apologies                                        |
| - Whether the minutes of the last meeting are a true record of that meeting or whether changes need to be made | 3. Minutes<br>(adoption of minutes)<br>(amendments) |
| - were there things from the last minutes that must be followed up                                             | 4. Matters Arising                                  |
| - All other items on the agenda eg. reports<br>5.1<br>5.2                                                      | 5. Reports                                          |
| <b>Note: In all these items you should record:</b>                                                             | 6.                                                  |
| - brief facts i.e. only key points of reports and debates                                                      | 7.                                                  |
| - what was decided                                                                                             |                                                     |
| - what is to be done and who is to do it                                                                       |                                                     |
| - when it will be done                                                                                         |                                                     |
| - Key points of correspondence received                                                                        | 8. Correspondence                                   |
| - Any other business that wasn't covered in the rest of the agenda                                             | 9. General                                          |
| - Date of next meeting                                                                                         | Date of next meeting                                |

1. When writing minutes give each item a number. The number must be the same as the number of the item on the agenda.

2. Use short, clear sentences and paragraphs.

## ACTIVITY: PICKING OUT MATTERS ARISING

There is no point in making decisions in meetings if you don't or can't check that decisions have been carried out.

It is necessary to follow up on items that are referred for further discussion before decisions can be made.

This happens a lot in meetings with management because either the union, or management, feels they have to discuss a matter more, before they can make a decision.

If you study an agenda there is an item called "Matters Arising". This is the time for you to follow-up on decisions and recommendations that have been made and to check that they have been carried out.

It is also the time to go back to unfinished items from previous meetings so that you can make final decisions.

"Matters Arising" is an important item in an agenda, but it should be dealt with very briefly in a meeting so that there is enough time to deal with all the other items on the agenda.

In the next activity you can practise picking out matters arising

### AIM

- To practise the skill of picking out matters arising from minutes

### TASK

Study the record of the meeting with management on pages 44 to 46 and pick out the matters arising. Make a list of these and discuss them in your group.

ON THE NEXT PAGE, WRITE DOWN YOUR LIST OF MATTERS ARISING

WRITE DOWN YOUR LIST OF MATTERS ARISING HERE

# CHECKING MANAGEMENT MINUTES



Shop stewards should correct the minutes before they confirm them.

In many cases shop stewards allow management to take the formal minutes. Shop stewards simply demand that they must get copies of the minutes before the following meeting.

At the following meeting, management then asks the shop stewards to confirm the minutes.

Sometimes shop stewards confirm the minutes without checking them carefully. This is very dangerous, as management can leave out important points or make a vague record of something when a clear decision was taken.

## HERE IS AN EXAMPLE

At a previous meeting, management promised to give the union a copy of a survey they had done of the maternity provisions in all the companies in their industry at the next meeting.

Management took the minutes of the meeting. Here is what management wrote:

"Mr Friedman reported that the Company had undertaken a survey of all the maternity provisions presently being applied in the industry. The union requested a copy of the survey. This request was noted."

At the next meeting the shop stewards confirmed the minutes at the beginning of the meeting. When, later, they asked for the survey, management said they had never agreed to give such confidential information to the union. They referred to the minutes to support their point. Can you see the problem?

# ACTIVITY: CHECKING MANAGEMENT MINUTES

AIM:

- To help you check management minutes

TASK:

Below is one section of the minutes that management took of the above meeting between the union and management at Slavins.

Check these minutes (see pages 44 to 46).

Say if you think they are a true record of the meeting or not.  
If they are not correct, say how you would correct them.

## MANAGEMENT MINUTES.

### Election of shop stewards

The union stated that it wanted 6 shop stewards. The General Manager refused this, and reminded the union that nowhere had the company agreed to more than two shop stewards. The union put forward the view that given the size of this factory 2 shop stewards would be too few. The company then agreed to discuss the union proposal with their legal adviser.

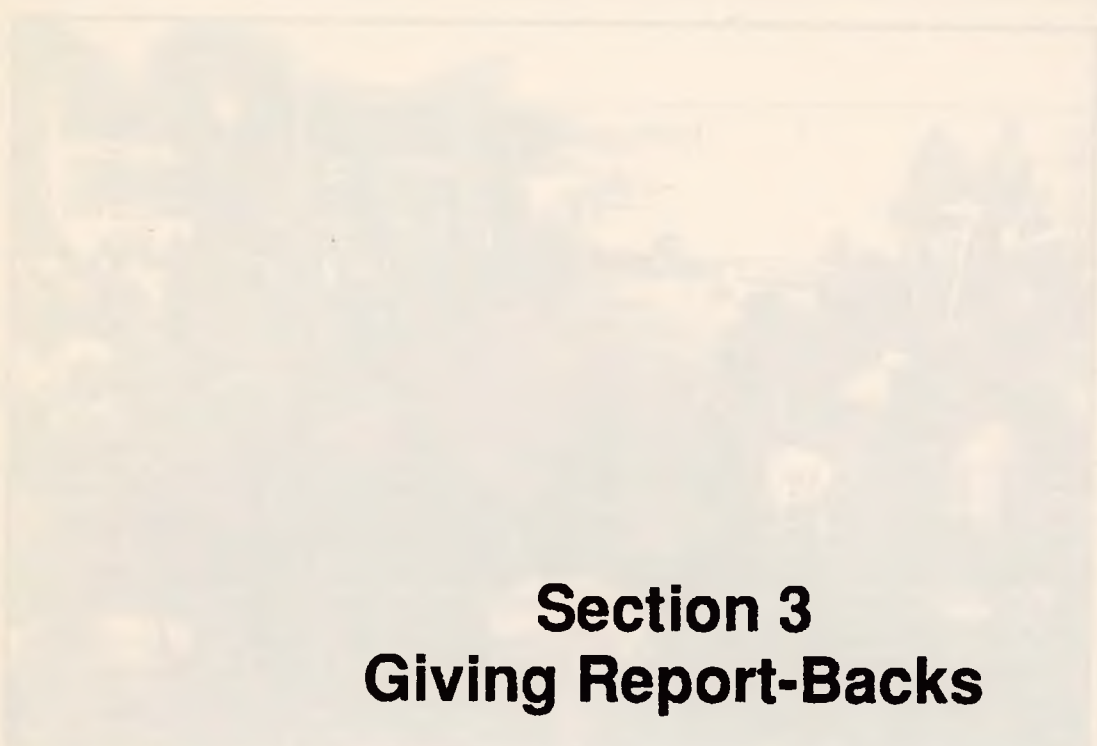
WRITE DOWN YOUR ANSWERS TO THE QUESTIONS BELOW IN THE SPACES PROVIDED. THEN DISCUSS YOUR ANSWERS IN THE GROUP.

1. Are these minutes a true record of the meeting?

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2. If not, how would you correct them?

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## Section 3

# Giving Report-Backs

**As shop  
stewards, one  
of your duties  
is to give  
report-backs**



## **GIVING REPORT-BACKS**

A strong union needs the active participation of all its members.

This will only happen if you give regular report-backs to workers. Then all the workers will know what is happening in their union.

Shop stewards often have to give a talk to mobilise members to take part in COSATU, union and other campaigns.

At times you need to explain union policies and encourage members to support these.

As shop stewards, one of your important duties is to speak at meetings.

# ACTIVITY: GIVING REPORT-BACKS

## AIMS

- To think about why report backs are important
- To think about how to give report-backs

## TASK

Discuss the following questions in your group.

Write down your points in the spaces provided.

(1) What union meetings do you need to report back on?

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(2) What problems can arise in the union if shop stewards don't give regular report-backs?

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(3) Who should shop stewards report back to exactly? (i.e. department or general meetings or both?)

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(4) There are good and bad report-backs. What things can help you give good report-backs?

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(5) What kinds of report-backs do you regard as bad?

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**There are two important things to remember about report-backs.**

**PLAN WELL BEFORE THE MEETING**

**PRESENT YOUR REPORT-BACK CLEARLY**

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# GIVING REPORT-BACKS

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We all know that report-backs are very important if we want to build a strong, democratic organisation.

We spoke to a union organiser and he explained how to plan and present report-backs.

This is what he had to say:

"What I can say is that it isn't possible to report on everything that happened in a meeting. Shop stewards must be able to choose the main items - the important matters - of the whole meeting and report on these."

## **But how do you decide on what things to report on and what things to leave out?**

"Shop stewards are people who are close to the shop floor - knowing exactly what are the workers' needs and what interests them most. Shop stewards must use this knowledge when deciding on the important items to report on.

"Also sometimes there are time limits on things that were discussed at meetings. Let's say for example, at a shop steward council meeting shop stewards advise that within two weeks they want a report-back on a matter. It is then important for shop stewards that when reporting back, that item must be a priority because there is a time limit."

## **Is it necessary to plan report-backs?**

"It is very important for shop stewards to plan for report-backs. Also its not a good idea to allow the chairman to give the full report-back. They have to share the items because we need to train others to be able to talk. If only the chairman reports back then some shop stewards can feel they aren't part of the meeting and that they don't need to assist the chairman with questions.

"If shop stewards plan report-backs carefully, workers will want to listen to the whole report-back."

## **What about the order in which you report back on items. Is that important?**

"It is important first to give an overview of the meeting and then to come to the main items. Let's say out of the 5 points you must report on, there may be 2 that are very important and the other ones are less important. I would recommend that shop stewards don't start with the important items. They should start with those that are less important in order to keep everybody in the meeting because once you have talked about the main items, workers will want to leave the meeting."

## **HERE IS A CHECKLIST ON HOW TO PLAN REPORT-BACKS.**

### **Think carefully about who you are reporting back to**

- What does your audience already know
- What do they need to know

### **Decide on the aims of the report. Is it:-**

- To give information
- To mobilise workers
- To get a decision or a recommendation
- To change ideas
- All or some of the above

### **Think about how much time you will have for your report**

- How long will the meeting last?
- How many things are also going to be discussed at the meeting?
- How short can you make your report so that you cover all the key points?
- Will there be time for discussing the issue and making decisions

### **Think about what language to use**

- What language will most of the people in the audience understand best?

### **Think about what your audience really needs from your report- back**

- Perhaps you are a delegate to a union BEC.

Before you report back to a general meeting you need to give a full report-back to the shop stewards. Then all the shop stewards can decide together what issues must be reported back to the workers.

You need to think about these issues very carefully because workers often get bored if they have to listen to long report-backs which try to cover all the points that were discussed in a very long meeting.

## **Think about what issues you must report back on and what issues you can leave out**

- It is very difficult to choose the right issues to report back on.

In each case you need to think very carefully about what your audience needs to know and what they know already.

You also need to think about the main purpose of your meeting and the kind of meeting you are reporting back on.

For example, you will need to cover lots of details if you are reporting back on a meeting with management, but only the main points and key decisions if you are reporting back on a 3-day National Executive Meeting.

In most cases you will be reporting back to general meetings.

So here are some ideas for deciding on what are the important issues to report back on to general meetings.

- You must report back on items that directly affect the workers.
- You must report back on items that workers need to discuss and make a decision on.
- You need to report back on important union policy matters
- You need to report back on broader issues that workers need to know about and discuss.

## **HERE IS A CHECKLIST ON HOW TO PRESENT YOUR REPORT-BACKS**

Giving good report-backs gets easier with practice. But here are a few points that can help you present a report-back clearly.

- Introduce the report-back in a way that gets workers interested
- Give a short account of the whole meeting
- Then go back and report on the different issues or points in more detail
- Stick to the main points. Don't go off the point
- Be brief - plan your report on each item so that your whole report fits into the time available
- At the end of your report, go over all the points that workers must make decisions about
- When dealing with issues that need decisions, don't go straight to the decisions that workers need to make. Report on the arguments involved first
- At the end of the discussion arising from your report back, summarise the decisions workers have made. Go over what action workers will be involved in

### **REMEMBER**

**SHORT**

**INTERESTING**

**COVER KEY POINTS**

**TIME FOR DISCUSSION**

### **NOTE:**

**It will often be more interesting if different shop stewards report on different issues. This needs careful planning before the meeting.**

**Sometimes, especially after meetings with management, it might be possible to make a short play of the meeting - this can make a report-back much more interesting and will give members a better idea of how stubborn management can be in meetings.**

# ACTIVITY: REPORTING BACK

## AIMS

- To help you practise the skills of reporting back
- To help you identify priorities for reporting back to general meetings

## TASK ONE

Step 1. Working on your own, make a list of all the issues that you can remember were discussed at your last BEC or Local meeting.

If you don't attend BEC or Local meetings, make a list of all the issues that were discussed at any other union meeting that you have attended recently.

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**Step 2: Write a list of the issues that you will report back on to a general meeting.**

Explain why you have chosen to report back on these issues and why you have left out the other issues.

**Discuss your answers in the group.**

This image shows a single page of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

### Step 3. Work in small groups.

**Plan a report-back to a general meeting on the meeting that you have been writing about.**

**Then choose one person from your group to present your report-back to the rest of the group.**

Blank lined paper with horizontal ruling lines.

# ACTIVITY: REPORTING BACK

## AIM

- To practise the skill of reporting back

## TASK TWO

Break up into small groups.

Study the record of the meeting between the union and management on pages 44 to 46.

In your group plan a report-back on this meeting to a general meeting. Then choose one group to present their report-back to the rest of the group.

Before you listen to the report-back, study the list of points on "How to present report-backs" on page 68.

Discuss the report-back using these points as a basis for your comments.

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## Section 4

# Giving Talks

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# GIVING TALKS

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Shop stewards often need to mobilise members to take part in COSATU, union and other campaigns. At times you need to explain union policies and encourage union members to support these.

**A strong union needs the active participation of all the members.**

Speaking at meetings gets easier with practice, but there are a few things that can help you to be a good speaker.

The following points can help you prepare talks.

## USEFUL INFORMATION

Find out what books, pamphlets and notes the union has got on the topic and use these when you prepare your talk.

Use facts, figures and statements of worker leaders. These things help convince workers. They also show workers that you really know what you are talking about.

## LOGICAL ARGUMENT

Think carefully about your aims before you prepare your talk.

Plan your whole talk well. Make sure each point follows from the last point.

Think about what workers know already.

Think about what workers' present views on the topic are likely to be. Work out and write down the main points you want to make - no more than 3 or 4 points for a 5 minute talk.

Stick to the main points. Do not go off the point.

Think about some supporting arguments for each point and write them down under each main point.

Arrange the main points and the supporting arguments in the order you want to make them.

Re-write your arguments in short notes.

## CLEAR CONCLUSIONS

Summarise the main arguments and raise some questions for discussion.

Give workers some ideas about the action they can take.

## PLANNING A TALK

### Meeting

What do workers already know

What do workers think about the topic

Size of the meeting

When do you speak

How long have you got

### Aim

? Giving information

? Trying to persuade

? Does this limit the number of points that it is advisable to make

?

?

### Structure

**Introduction:** What is the purpose of the talk?

What are you going to talk about?

**Main body:** First main point - supporting arguments

Second main point - supporting arguments

Repeat for each main point

### Conclusion/Summarise:

- ? What do all the points lead to
- ? What action is necessary

## IN OTHER WORDS

Tell them what you are going to say

Say it

Tell them what you have said

Call for some action if necessary

# ACTIVITY: GIVING TALKS

## AIM

- To practise planning and giving talks

## TASK

You have to give a short talk of 5 minutes to a general meeting on any of the following topics:

- the Labour Relations Bill, 1988
- the Freedom Charter
- the COSATU Living Wage Campaign
- Provident Funds
- Health and Safety representatives

Break up into groups.

In your groups choose one topic and prepare a talk of 5 minutes for a general meeting.

Choose one person from your group to give the talk to the large group.

Before you give your talks, study the points on "Giving Talks" on pages 75.

## WRITE DOWN THE PLAN FOR YOUR TALK

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## Section 5 Writing Reports

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# WRITING REPORTS

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Reports are very important in large organisations like trade unions since they are one of the main forms of communication.

In reports we can give information about an issue.

We can tell other workers about a meeting or other events.

Written reports also ensure democratic control of the organisation since they often reflect the collective voice of the union.

## Written reports are useful to:

- **Make people accountable and responsible for work undertaken**
- **Record work done**
- **Assess a situation**
- **Keep people informed**
- **Indicate future action**
- **Circulate new ideas**

There are 2 main stages to writing reports - **preparation** and **presentation**

## PREPARATION

1. Decide on the aim of the report. Is it:-

- to give information
- to change ideas i.e. to persuade workers

2. Decide who will read the report

- what does the audience already know about the topic?
- what does the audience need to know?
- what language will be best for the audience?

3. Find out what useful information is available for your report i.e. books, pamphlets, statistics and statements of worker leaders.

4. Decide on the main points you want to make. Work out supporting arguments for each point if necessary.

5. Go through the information and decide what is important and what you can leave out.

6. Always conclude with a **recommendation for action**.

## **PRESENTATION**

1. Write a first draft i.e. write it in rough form so that you can get an idea of how it will look.
2. Ask a few people to read it and give comments and criticism.
3. Write it again.

As we have said earlier, it is important to plan an outline for a report before you write the report or give a report-back.

## **HERE IS AN EXAMPLE OF HOW A PLANNED OUTLINE OF A REPORT CAN LOOK.**

### **REPORT TO JOINT SHOP STEWARDS COMMITTEE**

#### **Introduction**

- suspension of member for absence from work  
concerns everyone because discipline procedure broken, and sets precedent  
need for action to get suspension lifted at once

#### **Background to problem**

- member left work early to collect children  
arranged cover with fellow worker  
wife is ill  
has done this several times before without a problem

#### **Union case**

- Procedure completely ignored.  
No warning, no representation, no chance to state case  
never happened before.

#### **Union aim**

- get member re-instated at once

#### **Union action**

- insist on emergency meeting with top management  
if suspension is not lifted, consult members about action

#### **Conclusion**

- all reps should report case to members now  
shop stewards committee must give full support  
emergency meeting with management to get re-instatement  
further action if no success with management

## ACTIVITY: WRITING REPORTS

## AIM

- To give you practice in writing reports

## TASK

Write a short report on the main union activities in your workplace over the last month to present at your local or BEC.

OR

Write a short report for the Regional Executive Committee or BEC of your union on the last community meeting that you attended.

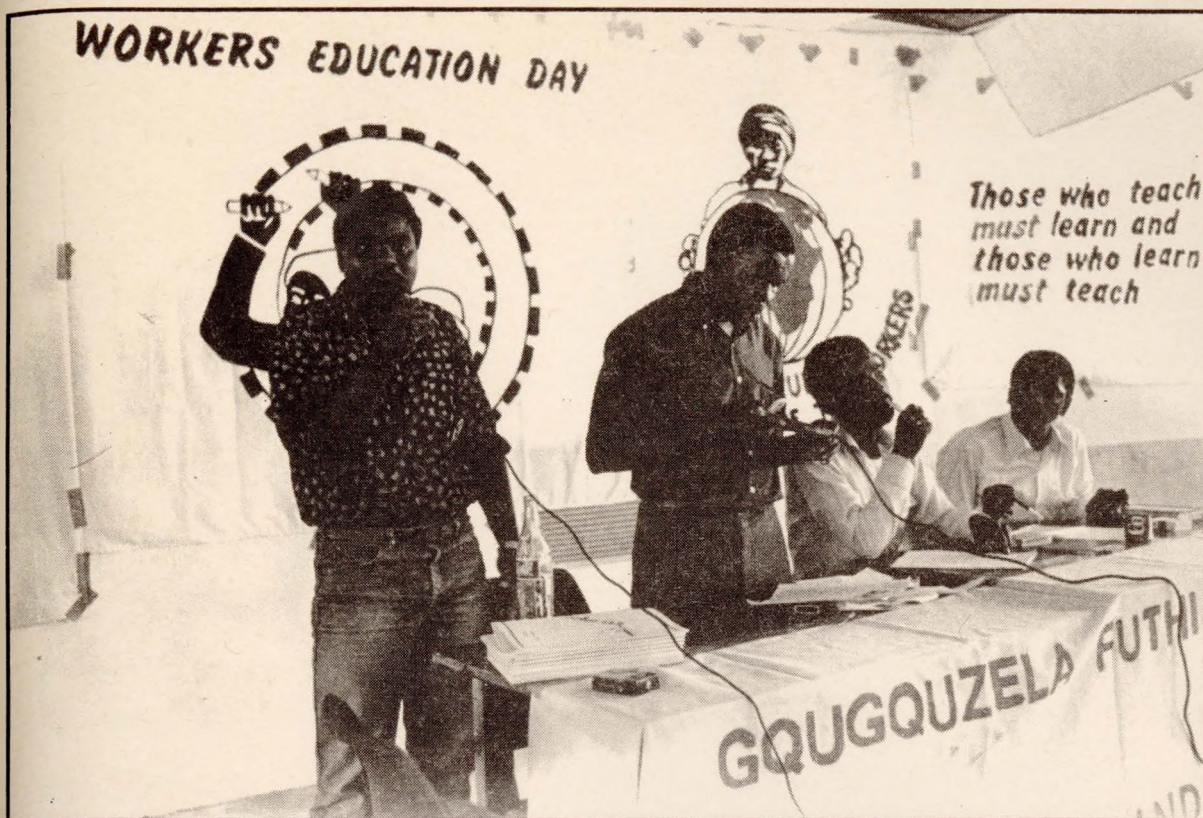
OR

Write a short report on any dispute that you have been involved in.

Then discuss the reports in the group.

WRITE YOUR FULL REPORT HERE - WRITE IT AS IF YOU ARE GOING TO SEND IT TO YOUR LOCAL OR BEC.

Blank lined paper with horizontal ruling lines.



It is up to you to  
help spread the  
skills you have  
learnt

## CONCLUSION: SPREADING SKILLS

The aim of this booklet has been to help shop stewards develop the skills of taking notes, writing minutes, reporting back and writing reports.

### TASK

In your group discuss how you can help spread these skills more widely in your union.

WRITE DOWN YOUR IDEAS HERE

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## Praise of Learning

Learn the elementary things!  
For those whose time has  
come

it is never too late!

Learn the ABC. It won't be  
enough, but learn it!

Don't be dismayed by it!

Begin! You must know  
everything.

You must take over the  
leadership.

Learn, man in the asylum!

Learn, man in the prison!

Learn, woman in the kitchen!

Learn, sixty year olds!

You must take over the  
leadership.

Seek out the school, you who  
are homeless!

Acquire knowledge, you who  
shiver!

You who are hungry, reach for  
the book: it is a weapon.

You must take over the  
leadership.

Don't be frightened to ask,  
comrade!

Don't be talked into anything.

Check for yourself!

What you do not know yourself  
you do not know.

Scrutinize the bill,

it is you who must pay it.

Put your finger on each item,

ask: How did this get here?

You must take over the  
leadership.