

COSATU EDUCATION AND TRAINING

ORGANISATIONAL MANAGEMENT TRAINING

FOR

COSATU ORGANISERS

PARTICIPANT'S MANUAL

(Developed for COSATU Summer School 1994 by HAP Organisational Development and CBDP)

January 1994

OBJECTIVES OF THE WORKSHOP

1. To enable participants to identify their own style of work and management of time.
2. To enable participants to consider important tools and techniques for managing time effectively.
3. To explore some administrative systems which support effective time management.

PROGRAMME

Day 1

09:00 Welcome and introductions
Programme overview and expectations

09:45 Managing our work time: Some key problems I

09:45 Tea

11:00 Some key problems: Looking at solutions I

11:30 Some key problems: Looking at solutions II

12:15 Some solutions to effective time management: Hindrances and helps

13:00 Lunch (looking at suggested actions)

14:00 Effective time management: Discussing and prioritising important elements

14:30 One week in a life of an organiser

15:15 Tea

15:30 Some important concepts for effective planning (input and discussion)

16:45 Diarising tomorrow's commitments

15:45 Key learnings of the day

17:00 Discussion

Day 2

09:00	Forward planning I:	Day Week Month Year.
10:30	Managing conflicting priorities/demands	
12:00	Effective delegations as a tool in time management	
13:00	Lunch	
14:00	Forward planning II: A check list	
15:15	Tea	
15:30	Effective administrative systems (its relation to the time management)	
16:30	Evaluation and closure	

WEEKCHART

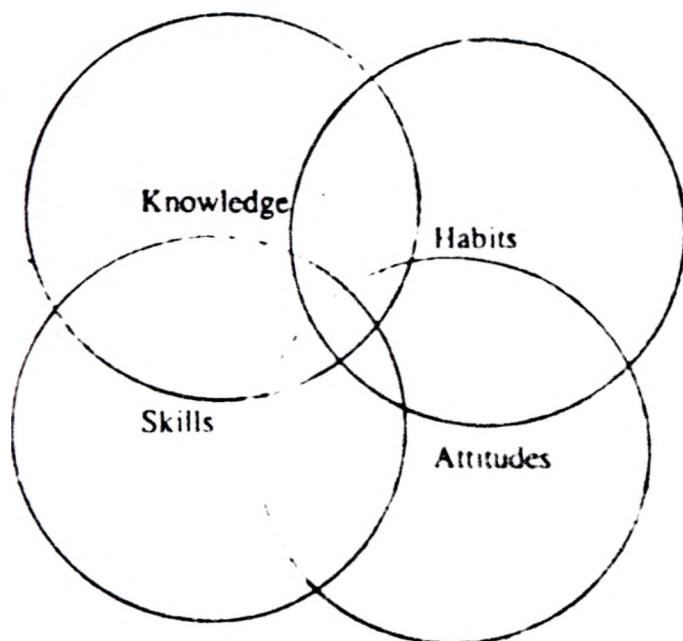
Week 37

MONDAY	FRIDAY
TUESDAY	SATURDAY
WEDNESDAY	SUNDAY
THURSDAY	NOTES

HOUSE OF EXCELLENCE

16 HANDOUT

4 IMPORTANT ELEMENTS FOR EFFECTIVE PLANNING



WORKSHEET

KEEPING A DIARY

Diary of S. Nteta, organiser, PAPAWU, Witwatersrand Region

TASK

1. Arrange the details in the block (in pencil) on the relevant diary paper - first individually
2. compare your entries in groups of 4 and discuss differences and reasons for these
3. Fill in entries you think are missing
4. Consider whether details for each appointment are sufficient and why

14:00 Meeting with Amalgamated Paper Industries - introduce union

16:00 Selby Printing Co. - strike check

09:30 Caucus / shop stewards, Wadeville Paper Manufacturing (WPM)
- retrenchment (Wadeville?)

17:30 PAPAWU local meeting Braamfontein

15:30 Free

08:30 Admin - messages, phone calls
files for day
meetings?

3 March 1994

10:30 WPM Management (retrenchment)

Transport? Wadeville

Report on WPM for executives

	Contact person on arrival?
API Newclare Road Industria	_____

14 Steel Road
Wadeville

Check how long?

HANDOUT: "DIARY MANAGEMENT: HELPFUL TIPS"

1. Try to block out the first 30 - 60 mins of each workday for returning phone calls, doing administration work eg reports, letters, claims, etc and drawing out all the files and documents that your will need for that day. You cannot allow the time every day, make sure that you book at least 3 days out of 5. However, it is important to block out sometime each day - to draw files and make preparation for the day. Prepare a "To do list" with noted priorities. Make sure that you no not permit any interruptions in this period - either telephone calls or people popping in to see you.

If you don't have someone else who can take calls for you, leave the receiver off the hook.

Close your office door, and if necessary hang a "Don't Disturb" sign on the outside. If someone does come in, keep your pen on the paper when you look up. Politely advise that you are busy, and arrange a time to connect with the person later.

Remember interruptions are a serious disturbance. It takes time, disturbs your concentration and sets your mind in other directions.

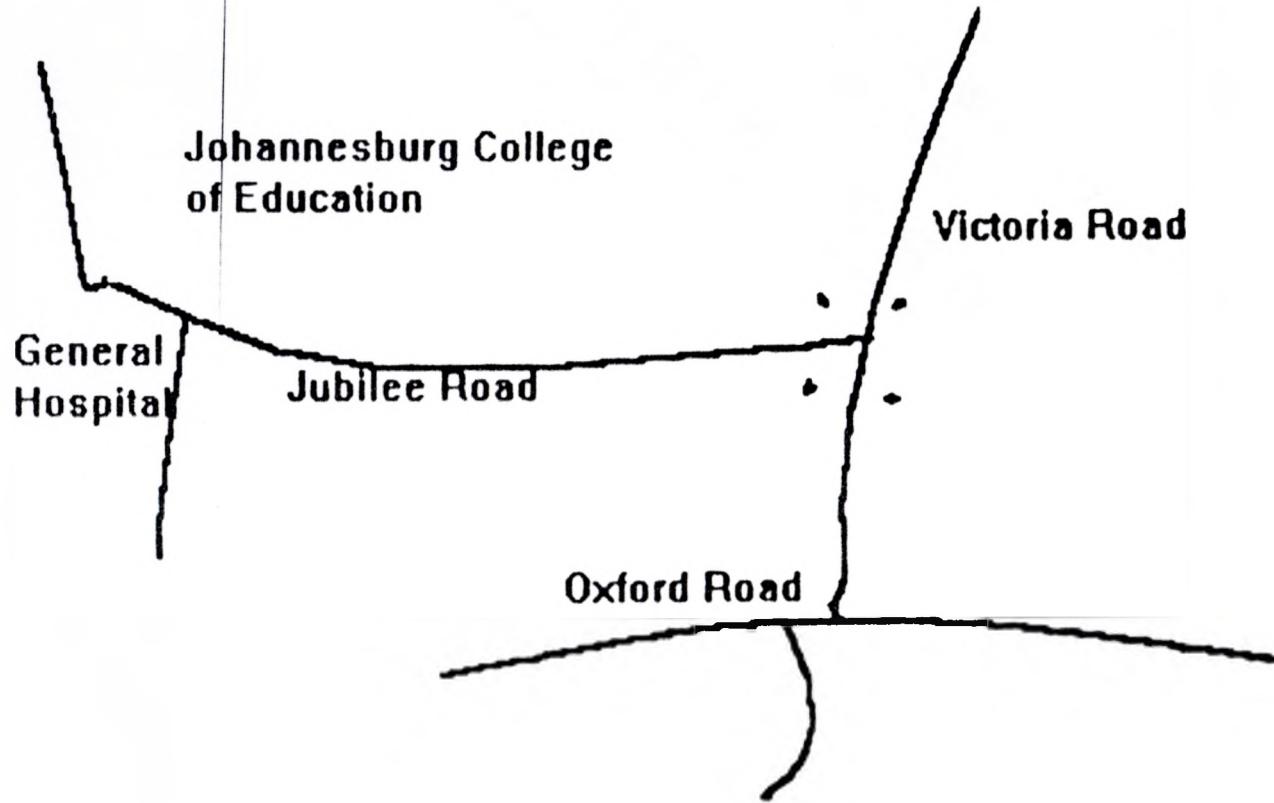
2. If you have to keep an appointment away form the office, make sure that your diary entry makes allowance for travel time.

eg 10:00 Travel to (28 kms NB: Need a car)
10:30 Alrode Factory IRON
10:30 Meeting with IR Managers
11:30 James Frazer (Ph. 497 2361 Boardroom - 2nd floor)
(Fifteen minutes allowed for lavatory breaks, any phone calls or meeting running overtime.)
12:15 Travel to Union Office (Germiston)

- 2.1 As you make the appointment write the details into your diary. Use a pencil in case you need to make any changes.

- 2.1.1 It is a good ideas to write down the persons address and a phone number. If you have not visited the premises before, ask for directions. always ask for the name of the street that leads into the street of the place you will be visiting eg CBDP is in an old house in Jubilee Road. No 5 Jubilee Rd - on the left side of the road travelling from Victoria Road towards Johannesburg General Hospital. If you were looking for Jubilee Road on a road-map you would quickly see where to go. If you have to rely on public transport, find out where the nearest taxi or bus stops are located and how long it will take by public transport.

NB: A road map is a wonderful time saver. If possible always carry a map book with you and learn to use it effectively.



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- 2.1.2 Phone the day before an appointment to confirm that the person is expecting you. If you are travelling in an unfamiliar area, town or city, inquire about the peak traffic pressure times. If you ave an appointment at 10:00, the same journey may take you only 30 minutes.
3. Always allow at least 15 minutes between appointments even if they are at your office. Remember you need sometimes to go to the lavatory, wash your hands, or grab a cup of tea or coffee. It is also important to allow yourself at least 5 minutes reflection time at the end of a meeting to take more of the main points; to make entries in your diary for follow-up action; to shift your mind into the next meeting.

Then allow yourself at least 5 minutes to prepare your attention for the next meeting and to make sure that your have all the documents or information that you will need. (Remember: You should already have organised this in the morning!)

4. Block out 15 minutes at the end of each work day to:

- check what appointment you have for the following day
- reflect on the day

Ask yourself:

4.1 What have I done well today?

Briefly write down the main points in your diary (This is good and important encouragement to yourself) and you can look back in your diary to see a record of your growing successes.)

4.2 What have I messed up today and what can I learn from this?

(Again capture the points in your diary. Remember we learn the most from doing things and the best lessons are those we learn from mistakes. That is provided we take note of the learnings and make sure that we do not repeat the mistakes.)

You can then look back in your diary and trace your growth and development.

4.3 What are the 2 most important things I have learned today about:

4.3.1 myself

4.3.2 my work

4.3.3 the people around me

Captured learnings are blocks to greater learning and development.

5. In each day of your diary make at least 15 minutes time to talk to your administrators to find out what they need from you and to tell them what needs you have.

Remember: they can only support you, if they know what you want.

6. In each day, allow a block of at least 30 minutes to deal with the unexpected.
7. In each day allow a block of at least 30 minutes to make and to receive telephone calls.
8. Take at least a 30 minutes lunch break. If you do not do this, you may end up wasting more time by becoming sleepy or dull during the day. Try and go for a walk around the block or sit quietly reading where you cannot be interrupted.
9. Allow at least 15 minutes each day to read.
10. Allow at least 15 minutes each day to discuss ideas, strategies, proposals, plans or problems with colleagues.

HANDOUT: "PLANNING"

1. What is planning?

Planning is the work we do to determine a course of action/s, the use of our time in advance, in order to prepare for the future. (ie day, weeks, months, a year ahead.)

2. Why do you plan?

- 2.1 It helps us to sort out our thoughts in a logical and rational way.
- 2.2 It helps us to put specific actions in a logical sequence/order.
- 2.3 It helps us to look at all the actions needed to achieve our goals.
- 2.4 It helps us to set measurable goals, which are achievable within a given time frame.
- 2.5 It provides a means through which time can be used effectively and efficiently.
- 2.6 It provides a means through which we can measure our achievements against an established time-line (evaluation).

THE ISSUE

Your union Textile Workers Union is concerned about unorganised labour in a large textile factory on the reef. You have heard about the factory and poor working conditions there through the boyfriend of one of your nieces. The issue concerns you greatly and you have decided that you have to do something about the unionisation of the factory and recognition of the Textile Union by the management. You have set a target date of 3 months to achieve this goal.

THE "FORWARD PLANNING"

Worksheet II

(The activities)

Using handouts III and IV, arrange the activities randomly listed here in a forward plan to achieve your goal of organised labour and union recognition in 3 months time.

- 1 Print leaflet and posters
- 2 Arrange to meet with Management for an exploratory meeting
- 3 Report outcome of the meeting with Management to the workforce
- 4 Inform union branch / local staff of the names of shop stewards
- 5 Prepare a leaflet on what the union has to offer workers and posters
- 6 Discuss your idea with staff of your union
- 7 Through the boy friend arrange to meet some workers from the factory who may be willing to help you
- 8 Prepare a briefing paper for the union executive committee
- 9 Meet with the management to negotiate recognition agreement
- 10 Share the plan with shop stewards of organised factories in the area to with support
- 11 Arrange a venue to address all the workers
- 12 Arrangement meeting with workers to share outcome of meeting with management
- 13 Call an Executive Committee meeting to discuss the proposal
- 14 Write a letter to management to confirm agreement
- 15 Arrange for union officials to meet with management
- 16 Prepare main points of agreement with management to share with workers
- 17 Meet with the Executive to get approval for the plan
- 18 Address the workers together with some of those who have already joined
- 19 Do initial recruitment in the local community of workers from the factory

- ~ 20 Arrange for distribution of leaflets on union and invitation to meeting
- ~ 21 Prepare draft recognition closed shop agreement
- 22 Elect shop stewards
- 23 Check whether membership cards and stop order application forms are in good supply
- 24 Negotiate main points of agreement with shop stewards
- 25 Report to the Executive Committee on outcome of the meeting with management and arrange meeting with interim shop stewards committee to familiarise them with stop order application forms.
- 26 Explain union procedures and branch membership responsibilities to branch officials
- 27 Follow up to get comments on draft agreement
- 28 Confirm time and venue of meeting with management
- 29 Send draft copy of agreement to management in advance of meeting
- 30 Report to the Executive on outcome of the first meeting with all workers
- 31 Circulate draft agreement to union officials and shop stewards for comments
- 32 Arrange with management to meet with workers on same day after meeting with them
- 33 Finalise draft agreement for sending to management
- 34 Discuss negotiation strategy with management in special meeting of delegated union officials and branch officials
- 35 Arrange meeting at factory for the election of interim shop stewards
- 36 Submit fully completed stop order application forms to management
- 37 Add any other activity that you deem necessary

Forward Planning 111.

Week One	Week Two
26 6.7 6.8 6.9 6.10 6.11	11 12 13 14 15
Week Three	Week Four
	
Week Five	Week Six Day One Day Two Da, Ti
Day Four	Day Five

USING LEGAL RIGHTS

When members are faced with a problem at work:

- ★ Find out if they have any rights that relate to the problem.
- ★ The rights could be either -
 - procedural (ways of dealing with the problem)
 - e.g: Discipline and grievance procedures
 - procedures for strikes
 - or,
 - substantive rights:
 - e.g: A right to a specified overtime rate of pay.
 - A right to maternity leave.
 - A right to compensation for injury at work.
- ★ Legal rights are victories that have been won - don't waste time fighting the same battle twice.

OVERHEAD

DISPUTES OF RIGHT AND INTEREST

INTEREST DISPUTES

- ★ Parties have interests before they have rights.
- ★ Interests exist alongside rights.
- ★ Legal Rights are established in :

Agreements (individual & collective),
laws (statutes, delegated legislation), or
the decisions of courts

- ★ Interest disputes are about the creation of new rights.
- ★ Resolving an interest dispute can result in :
 - an agreement that only settles the issue in dispute.
E.g: this year's wage increases.
 - an agreement which settles rights for the future.
E.g: An procedural agreement on piketing and the use of scab labour during strikes & lock-outs.

NEGOTIATING SKILLS

Guidelines arising from discussion of video

Getting Mandates and formulating Demands

- Prior research must be carried out e.g. type of company, previous agreements, current conditions etc.
- There must be proper planning for meetings
- There must be an idea of strategy when getting mandates e.g. what would be long term/short term goals and demands
- Prior to the general meeting with the membership to get a mandate, there should be a planning/strategising meeting with the shop stewards
- The general meeting should be held in an orderly manner, with firm chairing
- The role of the organiser is not to just take down everything worker demand, it is to give information (educate), give advice, make sure everyone understands.
- The meeting should reach consensus or a clear majority decision order to get a proper mandate. Listen to all workers – not just those talk loudest.

Preparatory for Negotiations

(not necessarily wage negotiations)

- full information should be collected from workers – organisers need to probe and get the correct story from workers
- shop stewards must be trained to give information to the organiser on an on going basis e.g. notices, change of ownership
- before deciding on how to approach the negotiation background research should be done e.g. checking agreements, legal position
- promises should not be made to workers
- when organisers take over a factory/ mine/shop from another organiser they must make sure that they have full information on that establishment. Note the importance of keeping proper records/files.
- once the organiser has established facts, planning should be carried out with the shop stewards committee prior to meeting with management.

Motivations

Negotiations is a combination of POWER and PERSUASION

Good motivation is the key to persuasion.

Needs:

- preparation – research / knowledge / tactics
- motivation to be logical and credible
- presentation skills
- unified team

Management style

Management style is changing. Union style is also changing.

Must know about new approaches and terminology around negotiations:

- interest based and positional bargaining
- adversarial and problem solving approaches
- win-win

Must know when to use various approaches.

Must learn to take advantage of new approaches without being bought off.

3. Know your opponent

- it is very important to know who you are dealing with in negotiations and where the real power lies. Research to be carried out on the type of company, ownership, company decision making.
- negotiating tactics to be planned with this in mind
- do not relax and take your immediate opponent at face value – s/he is playing tactics just as we do.

4. Using Caucus Time

- Caucus time should not be wasted. Even where management asks for the caucus, the time can be used for planning and strategising ahead.

5. Making Decisions

- the negotiating team needs to make an assessment of the situation before reporting back to workers.
- the team needs to come to a consensus position amongst themselves
- management's offer and the various possibilities to be presented to workers as well as the position of the negotiating team.
- workers debate and make final decision.

6. Reporting Back

- must report back in a confident manner
- explain clearly the circumstances surrounding the offer/position
- do not give the "bosses" explanation to justify the acceptance of an offer
- present the position of the negotiating team
- allow debate
- give clear leadership but beware of becoming a manipulator (note however that in some circumstances the organiser/shop stewards have to be very firm and take a stand against workers' wishes)

General Points on meetings with management

- establish your enemy – who are you sitting with around the table (there may be a consultant)
- union side to take full notes during the meeting – do not rely on management minutes
- shop stewards to participate in the negotiations
- caucus to be used for negotiating team to consult – organiser should not take his/her own decisions in the meeting
- no caucusing in front of management – call a proper caucus.

Our Education Principles

Education must aim to make worker control a reality

- Education must empower workers to take control of their lives, the union and industry
- From this it follows that our approach to education cannot be the same or similar to traditional forms of education (particularly Bantu Education)

Our education respects the knowledge people have

No person is a blank vessel to be filled up by an organiser or educator. All workers come into the union with a vast amount of experience knowledge and skills.

Our education must respect this knowledge and experience.

Our education must draw on this knowledge and experience and build upon this. This approach draws out, consolidates, expands what workers already know. It builds confidence.

Our education involves participation and active learning

People learn best when they participate in their learning. They learnt best when they are actively involved — using all their senses and using their existing knowledge. They learnt best when they can share their experiences with others.

Our education encourages critical thinking and should be creative

We do not want workers to be like sheep — repeating information, political positions, strategies given to them in lectures by educators or organisers. Our education must encourage critical thinking. It must encourage debate. Workers must receive information which allows them to debate, evaluate different perspectives and draw their own conclusions.

Our education is relevant

It is important that our education is relevant and meaningful to workers. Our education must deal with issues close to workers. It must also deal with core policies of the union and core values. In deciding what are the relevant issues, organisers and educators must listen to workers — use their concerns to build upon. Organisers must seize every opportunity to educate around issues close to workers.

Our education is well planned

Our formal programmes and formal workshops/seminar must be well planned. However, planning does not only apply to formal education. In all the information/indirect education identified, there should be planning, e.g. where we know that there will be opportunities to extend the knowledge and skills of workers, we should plan in advance how we will do this. What lessons can we draw? What skills can we advance? What materials can we use?

Our Education is rooted in our everyday activities

We do not see education as only 'formal' education. All our activities have educational value and can be used to extend our members knowledge and skills.

8. Educator to ^{clarify} our long VISION by Socialism