

OD in unions

a case study of NEHAWU

*Organisations,
like people,
have masks.*

*It is the job of leaders
to lift the organisation's veil and
uncover the organisation's mask,
long enough for the people involved
to see what's underneath.*

They may like what they see.

They may be horrified by what they see.

They may decide to change what they see.

They may refuse to see.

*But one of the choices is to put the mask
back on*

exactly as it was.

*This means that,
in uncovering an organisation's mask,
leaders must be extremely careful
not to tear it to shreds*

The labour movement has always grappled with issues of change, growth and development, and changing organisations. This has been done more enthusiastically in the last few years. The political and economic transition South Africa is going through requires unions to find new ways of thinking and doing at all levels of organisation. The challenge of finding ways to address organisational issues in a holistic manner was strongly raised in Chapter 9 of COSATU's September Commission Report, aptly titled 'Transforming ourselves to transform society'.

Crystal Dicks and Liz Thobejane outline how NEHAWU embarked on an OD process to ensure that it would be a better managed union, capable of dealing with South Africa's transition.

Unions and OD

At its 1997 Congress, COSATU and its affiliates committed themselves to a systematic and long-term programme of organisational renewal. The programme contained a number of core aspects, one being 'developing the capacity for OD in the labour movement'.

The September Commission argued that the labour movement should:

- develop and adapt the discipline of OD in a critical way;
- develop an approach to OD that is not alien to the labour movement's goals, values and needs.

A quote from the September Commission sums up the thinking: 'We always talk about transformation of society, transformation of government, transformation of the workplace - we never talk about transforming ourselves. We need to transform ourselves and our organisation

before we can transform society. We need to make ourselves effective.'

Ditsela

The Development Institute for Training, Support and Education for Labour (Ditsela) was mandated to work on developing the theory and practice of union OD. Ditsela, unionists and OD practitioners sympathetic to the unions have been working together to develop this theory and approach.

The Ditsela OD Network has been a forum for vibrant debates, discussions and sharing of cross-union experiences on a range of organisational issues. These range from conducting organisational reviews, through to sharing ideas and experiences on gender and organisational change and union culture. This forum has also provided an opportunity for unions to present case studies and thus share their experiences of building union organisation.

Ditsela has also been running a leadership and management skills programme¹ for senior unionists. This programme is unique in that it provides for the invaluable sharing of cross-union experiences. It also allows leaders to examine contextualised leadership and management theories and approaches.

A spin-off from the course is that a number of unions have put OD into practice. The first Ditsela course run in 1997 helped set in motion a process of organisational renewal within COSATU's largest public sector union, NEHAWU.

NEHAWU's organisational renewal process

Initial conception

In December 1995 NEHAWU adopted a policy document titled 'Realigning to meet new challenges'. The very act of adopting the realignment policy was a hard and

strategic choice that was informed by the necessity for change.

The need to change was imposed by the profound impact of the rapidly changing political dispensation that was brought about by the April 1994 democratic elections; and the sudden growth of NEHAWU membership from 60 000 in 1994 to about 120 000 by 1996.

The NEHAWU Realignment document asserted the following line of argument: 'Depending on our assessment and analysis of our current position, the proposed change can either be on a small scale or a surgical overhaul of the union. The extent of the change therefore will depend on the strategic choices we make and our vision for the future. But one thing is certain, change is a necessary path to follow. At the end we must emerge with the best option that promises to improve the quality of service to our membership. But it should also be an option that positions the union in a manner that will help us make the most impact into the federation and the transformation process generally in our society.'

Five-year plan

In December 1997, NEHAWU decided to engage in a process of multi-year planning. It had been doing this all along, but not ever in a conscious way. What emerged was a five-year Organisational Plan (the five-year plan). The five-year plan was not intended to deal with political and socio-economic issues; it was a plan to give overall operational direction and purpose to the daily activities of the leadership, membership and staff of the union. It was adopted as a flexible guide to action.

The overall thrust of the five-year plan was to critically search for improved ways of running the union to advance the interests of workers and the poor within the period of transition. The plan emerged



NEHAWU participates in Ditsela's OD Network.

from a strategic political framework. It was hoped that through the plan, the union could effectively and efficiently contribute to the building of a 'better life for all'.

Some of the plan's aims were:

- positioning the union organisationally and politically in a manner that will help it contribute positively and constructively to transforming the country and building socialism;
- providing a strategic sense of purpose to all members, staff and leadership at all levels through inspiring a culture of forward planning at all levels;
- improving the quality and delivery of service to members;
- building strong, efficient and responsive structures;
- ensuring that the physical resources of the union are appropriate to the needs of the organisation;
- examining, defining and developing the roles and capacity of union staff at all levels;
- creating the capacity for and facilitating the establishment of a new public sector union by building appropriate structures and systems.

The five-year plan was seen as a programme for self-renewal, a programme for internal transformation - an OD strategy. It was influenced by the September Commission and recognised that the 'problems NEHAWU was facing were not unique to NEHAWU

OD strategy

In October 1997, NEHAWU leadership participated in the Ditsela Leadership and Management Course. This course got leadership focusing on issues around building internal organisation and the effective managing of NEHAWU. The course helped focus leaders once again on seeing the union as a whole system. After the course, in January 1998, NEHAWU moved into partnership with Olive OD & T (a Durban-based NGO that participates within the Ditsela OD Network) to develop and facilitate a systematic OD strategy within the union.

Olive conducted an initial union review, interviewing head office staff and national office bearers. The results of the review were presented to NEHAWU in March 1998 and formed the foundation for the

development of the OD strategy, which was adopted at the NEHAWU April 1998 National Congress. The OD strategy would focus on four core areas:

- *Managing the union.* Leaders recognised that current union 'managers' are mostly drawn from the ranks of shopstewards, organisers and union activists and have very little or no experience in management. They suddenly found themselves having to manage very big organisations that face new and very complex challenges. NEHAWU saw the need to invent new forms of management through developing collective work, building trade union management skills and creating a new management culture within the trade union movement.
- *Union staff.* The plan recognised that the transition created a lot of ideological confusion for many activists and trade union staff. NEHAWU argued that a lasting solution was to cultivate a union vision and culture amongst staff that would make them feel part of the organisation.
- *Effectiveness, efficiency and democracy.* The plan acknowledged that democratic practices built over the years should be maintained; and union meetings added to the qualitative running of the union and the building of worker control. It also noted the importance of organisational efficiency.
- *The head office.* The plan argued for changes in the head office that would ensure it was a 'shining example of efficiency and effectiveness'. It stated that these changes should be informed by the direction and priorities set by the union. The union renamed departments, service centres.

The five-year plan aimed to prepare NEHAWU organisationally. It ends by stating that 'we can only build a better life for all if we are the most organised and

best managed union in the federation. Let us get ready to be the most organised and best managed union!'

Following an agreement on an OD policy and strategy the core challenge was how NEHAWU could translate the strategy into a clear programme, with mechanisms for delivery. A December 1997 NEHAWU central executive committee (CEC) meeting discussed and confirmed the broad thrust of the plan and referred it to the April 1998 congress for final discussion and adoption. The development of the plan and the NEHAWU OD strategy was a simultaneous process.

The NEHAWU OD process

Mechanisms for implementation

In June 1998, Olive facilitated a national executive committee (NEC) workshop. This NEC workshop adopted mechanisms for implementing the OD strategy. The union placed responsibility for driving the OD process on the Education Service Centre (Edusec). The Head of Edusec - the National Education Secretary, would have specific responsibility for overseeing the implementation of the OD programme in liaison with the secretariat. National office bearers would support the programme politically and drive it.

The union created the position of human resources development officer to ensure staff development and training.

In addition, the 1998 CEC established a strategic management team (SMT). The SMT comprised the national secretariat, all heads of service centres and provincial secretaries. The SMT was responsible for ensuring that there was a uniform understanding and implementation of NEHAWU policies and strategic decisions - particularly NEC decisions. It was an important mechanism for ensuring the consolidation of human resource, finance and administration policies,

procedures and systems.

The union also set up an OD standing-committee which would act as an important support structure for Edusec and the secretariat.

The OD standing-committee was eventually disbanded. The NEC set up various other standing-committees to support the OD programme including: administration and staffing, discipline and grievances; finance; education; and international affairs.

These committees would have research capacity and could make recommendations to the NEC. Members of the standing-committees were drawn from the NEC. They include a majority of worker office bearers and the member of staff responsible for leading in the particular area of work. The aims of setting up these committees included:

- to better inform the decisions of the NEC, thereby ensuring that the NEC developed capacity to make decisions,
- to ensure that the NEC was run more efficiently;
- to ensure that the NEC was able to focus on its strategic and review role, without getting bogged down with administrative issues

Building capacity within these sub-committees became an obvious accompaniment to establishing the committees themselves. The focus was on deepening worker control and developing leadership. It was necessary to ensure that workers were the majority on these committees, but also that those workers developed capacity and were empowered to engage with issues and truly lead in managing the affairs of the union at NEC level.

Implementing the OD programme

With the facilitation of Olive, the union agreed that the OD programme would

initially focus on specific target groups (the SMT, three pilot provincial structures of NEHAWU and the NEC) and the process would start with the SMT Provincial audits would follow. At the same time teambuilding workshops would be conducted with head office staff

The SMT would meet then in order to review the process. It would then plan for three provincial workshops based on the outcome of the provincial audits. The SMT would meet after the pilot provincial workshops had been completed to review the process, and agree to a process in relation to the other six provinces. The union also agreed there would be regular reviews by the secretariat, Edusec and Olive.

The strategy was clear - the OD process should target all key structures and role-players within NEHAWU: the secretariat, the SMT, the provincial office bearers and provincial teams comprising leadership, shopstewards, staff and members. This was seen as an important process for getting ownership for the programme. Olive would be central to facilitating the entire process.

First workshop of the SMT

This process focused on how best to strategically position the SMT within NEHAWU. It focused on clarifying the SMT's role and purpose and consolidating it as a collective within NEHAWU.

Provincial audits

The process started with Olive gathering information from provincial office bearers (POBs) and branch office bearers (BOBs), shopstewards, members at workplace level and staff on what they thought was working well and what less so. Olive visited the provincial offices and institutions with shopstewards. It conducted interviews with POBs, BOBs, branch and provincial staff as

well as with members more broadly at selected institutions

Provinces selected the people and institutions involved in the interviews. Olive ensured that a cross section of views and experiences were harnessed. These reports were presented to the secretariat and the SMT.

Three provincial workshops

These included a cross section of participants - shopstewards, office bearers, members and staff. Provincial leadership were required to be present throughout. Although the workshops were intended to address issues emerging from the audits, in reality they focused on the strategic positioning of the province in relation to its external and internal challenges. Participants developed ideas around their provincial tasks, purpose and the purpose of the collective.

Each provincial process had two outcomes: a statement on the purpose of the province, and a statement on how they intend working together as a collective.

HRD programme

The 18-month Human Resource Development (HRD) programme was closely linked to the OD process. It aimed at building skills for people to participate confidently in a process of change. The target group of the HRD programme was staff and union office bearers. The core aim of the HRD programme was to assist in building organisational management, finance and administration skills for staff and office bearers. It was to focus on training as well as on the consolidation of systems.

Building the head office collective

The union convened a series of workshops with different head office teams to:

- Introduce a consciousness amongst

head office staff around service delivery to members;

- generate an understanding of the purpose of the service centres, as opposed to the previously established departments;
- examine the role of the service centres.

The workshop also focused on the team, their task and purpose and how they planned to work together.

Second workshop with SMT

This workshop focused on developing and deepening the understanding of OD, the NEHAWU OD process, the HRD process and the link with the OD programme. It also focused on clarifying the role of the SMT in driving the OD process.

This workshop acknowledged that provincial workshops did not target the provincial executive committee as a structure leading the province, nor did the provincial processes recognise the central role of educators as 'agents for change'.

The workshop came up with a strategy on how to develop an understanding of the OD programme throughout NEHAWU, especially amongst POBs and provincial executive committees (PECs) and looked at how the OD process could be driven within provinces.

The workshop took a critical decision - to build OD capacity amongst educators, so that educators were able to understand and facilitate change. As a result, a week-long OD facilitation skills course was held for all educators.

Monitoring mechanisms

The SMT review meetings were very important in highlighting what was working well and identifying problems.

At the end of 1999, a third review process was held between Olive, Edusec and the secretariat. This meeting evaluated the OD programme and identified key lessons and developed a way forward for 2000.

Some of the 2000 focus areas are:

- continuing to build the capacity of provincial educators in OD facilitation;
- planning further provincial OD processes in the remaining six provinces and clarifying focus areas for provincial OD work;
- generating a shared understanding amongst various role-players at a provincial level of the OD process, including how this needs to unfold within each province.

At the time of writing, these provincial workshops were being conducted and no further review process has been held.

Lessons

The NEHAWU experience highlights a number of positive lessons that other unions can draw on:

- OD should not be seen as a once-off event – it's a process. There are no precedents for this process in NEHAWU – the process evolves within the union and discoveries are made as the process unfolds;
- any union OD process should take account of union sensitivities and union values such as worker control, democracy, power and politics;
- where the OD process is located is important. The process must be consciously led and co-ordinated/facilitated. There should be clear mechanisms for monitoring and review that are linked to the 'centre of power/decision-making'. The NOBs and leadership at all levels as a collective need to be in the driving seat of any OD process for it to work and run consistently within a union;
- an outside facilitator brings in an outside perspective that is often a reflective one and brings experience, fresh ideas and the neutrality to work through difficult issues that may emerge

during the OD process;

- any union OD process requires political will and commitment. Clear and consistent guidance and leadership must be given throughout the process to various structures within the union rooted in union values;
- those leading the OD process need to demystify the process to help minimize initial fears amongst particular role-players. It is very important that all role-players are brought on board from the very initial phases of the process;
- the union must ultimately decide on the framework it wants to use for understanding OD and ensuring that the framework meets its' needs. The union must also develop its own model for managed change;
- union leaders need to clarify what the concept of management means in a union context. Leaders can then ensure that they are not trapped with 'management' terminology, management approaches and other baggage which is philosophically challenging for unions. This emphasises the importance of rooting OD within a union context, and subsequently the importance of how we facilitate and implement an understanding of OD within trade union organisations;
- unionists need to develop a clear focus and clear aims for the OD process. This should include clear outcomes. Only then will those involved appreciate what has been done;
- the OD process brings new challenges, questions and work. It requires energy and strong support systems;
- an OD process can be a costly exercise. ★

Footnote

1 A course in the Ditsela Advanced National Labour Education Programme (DANLEP)