South African Democratic Teachers’ Union

National Induction Manual

1) Organising,
2) Recruitment,
3) Retention Strategy,
4) Case Management
EVERY MEMBER, EVERY LEADER IS AN ORGANISER
TABLE OF CONTENT

ITEMS

• TRADE UNIONISM
• HISTORY OF SADTU
• FUNCTIONING OF A TRADE UNION
• THE CONSTITUTION
• RULES OF PROCEDURE FOR MEETINGS
• COLLECTIVE LEADERSHIP
• POWER, AUTHORITY AND ACCOUNTABILITY
• STRATEGIC PLANNING
• IMPORTANT TOOLS FOR EVERY SADTU MEMBER
• ORGANISING AND RECRUITMENT
• GRIEVANCE HANDLING
• CASE HANDLING/MANAGEMENT
• REPORT WRITING
• FINANCIAL MANAGEMENT
Aims of the Trade Union is to:

• To **negotiate** with employers
• To **protect** workers
• To **educate** workers
• To **represent** workers
• To take **legal** action when necessary
• To **unite** with other unions, to strengthen the workers’ power to negotiate with employers and other authorities
• To **advocate** better social and economic policy that is pro working class
• To organise a **strike** as the ultimate weapon for workers to put pressure on the employer
HISTORY OF SADTU

- Formed at a teachers’ conference in Harare in April 1988, this “Harare Accord” organizations formed the National Teachers’ Unity forum (NTUF).
- Formed by the merging of; (ATASA), (UTASA), (TASA), (NUESA), (DETU), (WECTU), (EDASA), (PTU), and (PTL)
- COSATU became the midwife to this unitary non-racial, non-sexist, democratic union of teachers.
- (ECTU), (LEPTU) and (MATU) were admitted as affiliates and the (NTS) and (TTA) as observers by (NTUF).
- This unity process culminated in the establishment of SADTU, launched in Johannesburg on the 6th October 1990
• SADTU challenged the legitimacy of ethnic education departments.
• SADTU made an important contribution to the struggle for non-racialism in South Africa.
• Cde Shepherded Mdladlana, founding President, 1991, re-elected President at the first Congress.
• The General Secretary was Cde Randall van der Heever and the Assistant GS was Cde Thulas Nxesi.
• Congress resolved to discuss of affiliation to COSATU and the National Council resolved favourably.
• Aim is to eradicate all forms of discrimination.
• Is now largest education union, 260,000 members.
• International affiliation to (EI), (AATO) and the (SATO).
• Continue to participate in a transformative programme of national reconstruction and development.
• Championed the installation of democratic government, with COSATU and its unions.
• Is involved in transformative processes in the form of policy making, review and implementation.
FUNCTIONING OF A TRADE UNION

• **Constitutions**, is the rule book, the bible and life of the union
• **Organizing**, ensure that members play an active and ongoing role in the trade union
• **Purpose**, lays out the reason for the union existing and will relate to protecting workers and advancing their interests.
• **Principles**, are set out in the constitution through policy, e.g. Workers control, democratic centralism,
• **Decision making structures**, is a congress, council, or conference of membership representatives, parliament
• Election of office bearers at various meetings, conference, councils and congress
• **Financial controls**, stipulate who can make decisions and limit transaction that officials make,

• Stipulates books be audited, deals with roles and duties of the treasurer and regular reporting

• **Meeting rules and procedures**, sets out how meetings, Council, Conferences and congress should be run

• Deals with powers and duties of the chairman of a meeting.
CONSTITUTION

Introduction:
• A constitution is the rulebook, a guide, prevents disputes and arguments and all office bearers must know it to save time,

Constitution sets out:
• The aims and objectives of the union and what the benefits are to union members, Who can be a member of SADTU.
• The rights and duties of members, The structures of the union, from workplace up to national level
• Who sits on each SADTU structure, The procedures and rules for meetings of the union, How the finances are controlled
• Which structures will deal with the day-to-day affairs of the union
• Matters concerning industrial dispute and how to conduct ballots
• How union leaders or office bearers at each level are elected
• And powers of these office bearers
RULES OF PROCEDURE FOR MEETING

Introduction:
• For a meetings to succeed in carrying out the business and take decisions, procedures must be adhered to

Meetings legality/validity is if held in accordance with:
• Country’s laws, common law and the union Constitution of
• Custom and tradition (i.e. procedures at meetings) of union
• Convened by a person authorized to do so
• If a quorum is attained
• If the Chairperson has been properly appointed
Meetings

• Meetings are determined by structures found in the Constitution.

• Programm of meetings must be drawn annually i.e. frequency of per Constitution.

NB: Ref. to Const
COLLECTIVE LEADERSHIP

• Move from more autocratic, rule-bound approaches of the apartheid government to democratic, accountable, participative and equitable forms of leadership
• Build shared visions and goals, and acting together to achieve those visions and goals
• Take views and ideas of others in the group into account.
• Leaders delegates tasks but must ensure that the delegated members have a clear understanding of what is expected
• Since we value human rights and equality; needs to involve both men and women
• Female leadership is particularly pertinent in our Union
DEVELOPING COLLECTIVISM

Attempt the Activities below

• Activity no. V –
• Activity no. W –
• Activity no. X –
• Activity no. Y –
• Activity no. Z –
POWER, AUTHORITY AND ACCOUNTABILITY

• **Power**, if you are able to get others to do what they want by force, oppressive regimes or by persuasion, democracy

• **Authority** is if you hold power legitimately, through appointment or election, thus earns the respect of others

• **Accountability** is when leadership is prepared to explain their decisions and actions to those they lead

• Constantly **communicate** to members, and report significant developments in union activities, policy or decisions

• NB: Non-communication brings about rumour mongering, disorientation, dissent, volatility and disgruntlement
MANAGING INTERNAL CONTRADICTIONS

• Cultivate a culture of open debate to avoid suspicion
• Leaders are not immune from criticism
• But must be constructive and done to build the movement
• Cadres must reflect upon in a quest to improve their revolutionary activities and comradely behavior
RESPECTING ELECTED LEADERS

• All of us posses leadership qualities but few cadres will be entrusted to lead the organization at different levels

• Thus deserve the respect of all, no matter how intelligent we think we are in comparison to them.

• Our duty is to strengthen the capacity of these leaders and work with them and regard leaders as a unitary figures
ORGANISATIONAL DISCIPLINE

• Every member must adhere to organizational principles and objectives
• Issues must be raised internally and constructively.
STRATEGIC PLANNING

Introduction

• About clarifying aspects, which should be used to analyze and planning in an organization

Features of a turbulent environment:

• Socio-economic changes, Economic patterns, Breaking with existing trends.
• Increase in dynamic complexity in social and economic areas
• Organisations therefore face increasing unpredictability of social and economic future
• patterns and increasing potential instability in social, economic and institutional life.
Strategic planning

• Is charting way forward towards the envisaged future.
• Is to outline strategic and necessary objectives, procedures and implementation strategies to achieve set objectives.
• Is a commitment to change and implement decisions
• About accountability and responsibility
• Its characterized by organizational self-examination, confronting difficult choices, targets and setting new priorities
Strategic perspective deals with the following:

• Drawing out where, when and how an organization might position itself
• This is in relation to essential stakeholders and a constantly changing world.
• This is about balancing the interests of a number of different stakeholders.
Possible shortfalls in strategic process

• Not enough information can result in decisions being taken on misinformation, thus mislead the organisation.
• The synthetic process is often weak if some data is not well understood or it is simply left out.
• Assessing the implications of taking certain options not done.
• Ideas are not anchored into shared objectives, and objectives are often not converted into operational plans.
• Structures and systems are not reformed to carry the organization’s new direction.
Strategic thinking process?

• About striving for organizational success and sustainability.

• Achieving goals and objectives as well as developing to be more complex and operate at higher level.

• A reflective and continuous process.

• A way of looking at your organization in relation to its broader and ever-changing environment.
• It seeks opportunities for change development and strategies to adapt to new changes.
• The important thing is to do environmental Scanning of what influences the organization.
• mainly, it is the implementation considerations on an ongoing review at each phase of Strategic Planning
• Determine which elements need immediate implementation.
What it is not

• An event conducted once a year for two or 3 days
• It is not program or activity planning
• It is not SWOT analysis
• It does not seek status or stability
It Deals With

**Vision:** Which briefly points to outstanding structures in an organization including its daringness and foresightedness about where that organization should go and what to do to get there.

**Mission:** Refer to the reason for the existence of that organization, i.e. the aims, objectives and purpose.
Environmental Scanning

• Know the environment in which the union finds itself in.
• That way its easy to adapt or if not the union dies.

The following factors are critical

• Political climate
• Economic factors
• Social factors
• Technological factors
SWOT Analysis

- **Strengths**: Specific advantages used to exploit an opportunity or reduce or overcome a threat.
- **Weakness**: A specific disadvantage in an organization.
- **Opportunity**: A favourable or unexploited situation not yet utilized favourably to the advantage of the Organization.
- **Threat**: Is the unfavourable situation, which, if not proactively dealt with, could lead to harm in the organization.
Implementation Consideration

• It is necessary to understand that the important test of implementation is the degree to which leaders use the Strategic Plan in their everyday decisions.

• What is important in this regard is how the financial and human resources are utilized in taking the organization forward.
Human Resource Management

• Skills audits must be conducted from time to time.
• Success of organization lies in the ability of the leadership to lead and management to manage.
• Someone who leads must be a complete leader.
• The trade union movement, like all organizations, needs these skills.
**Conflict**

- Excellence in an organization process depends on conflict.
- Only conflicts can raise the different points of view, surface innovations, hone ideas that may be initially rough, tap all the resources of all participants.
- Learn to use conflict productively, it teaches one to be involve in communication skills.
- Communication is merely about listening to you and others, lack of it causes conflicts.
South African Democratic Teachers’ Union

National Induction Manual

1) Organising,
2) Recruitment,
3) Retention Strategy,
4) Case Management

!!! Introduction to SADTU, the Union of Choice, and What it Stands for !!!
How Unions Exist

How Unions Exists

• Chapter 2 of the RSA Constitution guarantees the right to “Freedom of Association”

• Section 23, confers a right to: “Labour Relation” as follows:

1) Right to fair labour practice.
2) Organise (recruit) members.
3) Form and join trade union.
4) Form and join a federation.
3) Engage in collective bargaining
4) Strike
How Unions Exist ????

• Chapter 2 of *Labour Relations Act* then gives effect to the allude Constitutional rights.

• Section 4, 6 and 8 of LRA, clarifies and explains these “organisational right” in depths.

• All trade unions are thus expected to be formed, operated, registered strictly in terms of the LRA.
How Unions Operates ???

Unions are also expected to comply with LRA provisions;

1) Have a clear **Scope of operation**
2) **Have a specific Sector** it operates on
3) Controlled, Run and Paid for **by its members**
4) Have approved **constitution, and policies**
5) **Have congress and elections**
6) **Have Reports, Minutes and Audited finances**
DUTY and RESPONSIBILITY of UNION

Duty is to:

• **Organise and recruit** workers in factories; institutions, schools etc.

• Elect shop/site stewards, and (executive) committees to **represent members**

• **Discuss the problems** with members at workplaces

• The shop/site stewards or committees should take the **workers’ problems to the management**

• **Always report back** to members at workplaces

• To **protect and educate** workers from time to time
IMPORTANT TOOLS FOR SADTU LEADERS

Important documents for a SADTU leaders to possess and know

- RSA Constitution and LRA, BCEA, EEA and related Policies
- SADTU and COSATU Constitution, Policies and Resolutions
- SACP, ANC Constitutions and relevant Policies
- The PSCBC and ELRC Collective Agreements
- A list of Updated Member’s Records of names, addresses, and phone numbers, seniority, classification and wage rates.
- Membership Forms and cards
- A copy of the employees’ Rules and Regulations
- Grievance forms
- Pencil and Paper (Notebook)
ORGANISING AND RECRUITMENT STRATEGY

Tips for persuading workers to join SADTU:

• Have **enough time for a discussion** and meet more than once.
• Give **copies of the constitution** and help them understand it.
• **Take views seriously**, and try and answer their questions and assist to address their fears and doubts.
• Explain **how democracy in the Union works**, and how members can influence decisions and play a meaningful role.
• Explain what the union does and explain the **conditions of service** that have been negotiated and that SADTU achieved.
• State that you will **find out and report-back** to them.
• **Don’t over-react** to what the workers might say.
Organising..cont/...

Tips for persuading workers to join SADTU:

• Try and be **calm and friendly**.
• Be ready to **explain various policies** of SADTU
• Persuade workers to **advance transformative campaigns** of the union and play an active role.
• Don’t be afraid of **discussing politics**.
• Have a copy of a **training manual on handling cases**, 
• Make the new members aware of **SADTU code of conduct**.
FACTS to STATE ABOUT SADTU

State and Confirm that SADTU:

- Is registered as per LRA 66 of 1995 as amended.
- Organising in the Public & Private education sector.
- Has over 260 000 now from initial 30 000 in 1990.
- Has a viable constitution, consists of structures, has sound finance policies and rules and procedures.
- Represents 70% in the (ELRC) and 22% in the Public Service Co-ordinating Bargaining Council (PSCBC).
- Requirements to participate in ELRC is 100 000 and 50 000 members PSCBC.
- An affiliate of COSATU, which in tripartite alliance.
Scope of Operation of SADTU

State that SADTU operates within the **Education Sector**:

- **School-based**: teachers, General Assistants, Admin assistants, etc in the persal payrol
- Recruits **SGB and College Councils’** employees
- **Office-based**: Specialist Educators, Assistants, Clerks, Administrators, Managers and Officials.
- In **Vulnerable Sectors** such as: FET/TVET Colleges, ECD, Service Centres and ABET/AET
- **Private, Independent and Special** Schools (LSEN).
- Works closely with **COSAS, NASGB and SASCO**.
What to Tell about SADTU

• **Achievements at**: bargaining, government policies,

• **Campaigns**: QLTC, SADTU Fridays,

• **Programs**: SAC, Education and Gender, May Day, Mandela Day, World teachers day

• **Participation in**: Equity Forums, Departmental consultation meetings, ETDP Sita, SACE, NECT, ELRC, PSCBC, FETCBU

• **Teacher Development**, led by Curtis Nkondlo, JET

• **Site Steward Training** and Inductions for leaders, seminars for school managements
Talk About SADTU Struggles

• Against continuing of *yearly ANA*
• Against introduction of compulsory *Mandarin*
• Introduction of *African Languages as medium of instructions*
• *Anti-Commodification of education* by Curro, Monash and Sparks Schools
• Heightened *safety and security* measure at schools
• Against *Corruption in schools, Dept and society*
• Seek *decent pay, parity* payment and more benefits
• Demand *improvement of conditions of service*
## CASE HANDLING

### Distinctions; Complain, Grievance and Dispute

- **A complaint** is a petty and informal clarity seeking statement from a member about certain anomalies, inconsistencies etc.
- **A grievance** a dissatisfaction formally registered by an employee, arising as a result of various issues of concern.
- **A dispute** is any serious disagreement or opposing views from an individual or a group, a formal complaint arising out of an existing right conferred by a legislation, contract of employment, policies or rules.
- Such may arise out of a breach or violation as well as variation thereof.
A legitimate grievance means management has violated either:

- A collective agreement,
- law,
- Acted unfairly
- Individual rights
- Policies
- Rules
- Procedures
- Principles
- Acted unethically
- Acted inconsistently
How to Represent a Member

Techniques

• **Remain calm**, it helps to defuse the situation.
• **Listen attentively and patiently** to worker’s story.
• **Set ample time** to discuss the grievance, no rush
• Let the **aggrieved member explain** the problem.
• Ensure you get the **facts right on key points**
• **Use the SIX Ws’** to ask all the basic questions.
• Explain why you want to **have all the facts** before you meet with management; to increase chance of winning the case.
Preparations Stages

Stage 1

• Explain the Case or Charges, what determines a just cause, prior grievance settlements or similar issues
• Make the aggrieved write down the full story themselves, giving names, dates and places and refresh his/her memory.
• Tell the aggrieved member what you will do next to avoid misunderstandings with the aggrieved member
• Collect statements from all available witnesses in order to find out what really happened.
• Brief members in advance of any meeting with employer, to help the member to keeping a cool head
Preparations Stages

Stage 2

- **Call for expert advice** before attending any meeting or taking action, call your union office, if the matter is urgent, say so
- Remember, **ask permission to leave job**, if not fulltime, in order to investigate a grievance, do uphold the law yourself.
- **Ensure confidential matters** are treated as such at all levels
- Once you have completed your investigation, you should make a written record to ensure **key points are not forgotten**
- One test to ensure that you have done a thorough investigation is to check **The Six W**,
The Six W’s

The Six W’s that should be included:

• **WHO** is involved in the grievance? Name, profile, etc.
• When did the grievance occur? Date, time, etc.
• **WHERE** did the grievance occur? Location, depart, class, etc.
• **WHY** is a grievance? What has been violated”? This “W” directs your attention to what has been violated.
• **WHAT** has happened that caused the violation? What is involved? What is management’s contention?
• **WANT !!** What adjustments are necessary to correct the injustice and please the aggrieved?
Preparations Stages

Stage 3

Get copies of all relevant documents including;

- **Charge Sheet** or grievance copy
- Copies of *relevant and useful documents*
- Copies of employers’ *rule, procedures, etc*

Important points to Remember:

- Be **tactful**
- When in doubts, **seek help from experts**
- **DO NOT TRY TO BE A HERO**
Preparations Stages

Stage 4

- Prepare a written admission or denial
- Obtain an explanation for the charge
- Request evidence that the employer may want to submit
- Obtain the story of the accused as related to the charges
- Obtain documentary proof of the story told
- Obtain names and addresses of potential witnesses
Preparations Stages

Stage 5

Consult or Interview Witnesses

- In private; one on one
- Establish their relationship with the client / accused
- Find out if they have been approached by the investigating officer
- Inform them they have been called upon to testify
- Compare version of the witness to that of accused
Preparations Stages

Stage 6

Preparing the Legal Issues

- This should be as thorough as possible
- Make a summary of the legal position
- Record sources like textbooks and decided cases
- Note where the onus lies and its effect on the case
- Summarize the facts of the member and match it to the legal position
Preparations Stages

Stage 7

Securing witnesses

• **Subpoenas** should be secured for witnesses
• Help secure **time-off** for the witness(es)
Preparations Stages

Stage 8
Final consultations

• Take the member through the initial statement and find out if there are changes to be made.
• Explain the documentary evidence and its effect on the case
• Assess the strengths and weaknesses of the witness(es)
• Avoid suggesting how the client should testify
• Discuss the possibilities of settlement or plea bargaining
• Explain to the witness the procedures during the hearing and what is expected of them
• Conduct a mock examination in chief, play devil’s advocate
Preparations Stages

Stage 9

PRE-TRIAL CONFERENCE

• Should be considered to attempt to narrow down the issues

ESTABLISHING RELATIONS

• Establish relations with the Presiding Officer / opponent / witness (es) / etc.
• Treat all parties with respect to avoid prejudice to your case
Preparations Stages

Stage 10

Language and demeanour

• Use a language of your choice, agree to a language code
• Make a request for an interpreter where necessary
• Speak clearly and at a reasonable speed
• Be brief and to the point
• Avoid verbosity and repetition
• Use simple language, avoid too much jargons and bombastic
• Avoid confrontation with the parties
• Concentrate on important aspects
Case Administration

How to Process a Case Administratively

• Opening a file
• Putting tags
• Variation of cases in terms of priority: urgent, etc
• Indicate status; complete, referals, ongoing
• Separate according to institution: ELRC, PSCBC, Court
• Coding file alphabetically
• Archiving in safe lockers/shelves
• Keep list for ease of reference
Conclusion

In conclusion

• The more the membership the more the power to negotiate, influence and dictate policy direction.
• There should be nothing about us without us.
• No; to unilateralism and disrespect for bargaining
• Need to implement Pillar number One (1) of SADTU’s 2030 Vision, Recruit and Retain members.
THANK YOU

LET US ALL REMEMBER THAT

WE ARE ALL ORGANISERS

!!!!!!!!!!!!!!

SADTU's National Induction Manual