

#### **ACKNOWLEDGMENTS**

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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: Dealing Effectively with Harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



### PREFACE: ASSERTIVENESS TRAINING

Management responsibilities entail, among other things, leading in providing the strategic direction, taking teams with, and ensuring that everybody pulls in the same way, once the direction has been jointly determined. Taking charge requires that women managers be clear about where they stand and that they can stand for what they believe in, even in the face of opposition.

Managing requires also the ability to take decisive action against those that deviate from the regulations. The ability to perform all these people-management functions effectively and fairly necessitates that the woman manager should:

- Be aware of her rights as a representative of the employer, as well as her own.
- Exercise these rights in a manner that is respectful of the rights of others.

However, women often battle to assert themselves due to a myriad of factors that include the legacy of apartheid as well as cultural factors that encourage docility on the part of women. The extent to which these factors play out and affect a woman manager's ability to manage is influenced by the type of environment in which the woman manager finds herself.

This module hopes to contribute to women managers' quest for personal development in the direction of becoming more assertive, while being mindful of the need not to violate the rights of others.



### **EXPLANATORY NOTES:**

<u></u>	=	FACILITATOR'S INPUT/NOTES	-	This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.
	=	HINTS	-	This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.
<b>⊙</b>	=	ROLE-PLAY	-	This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who par-



EXERCISE

 This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.

ticipated actively in the exercise.



CASE STUDY

 This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.



SELF-TEST

 This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.



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#### INTRODUCTION

Although the number of women managers in education is increasing, women continue to experience problems that prevent them from realising their full potential as managers. These obstacles can emanate from:

- Personal factors.
- Organisational culture.
- Cultural factors.
- · Lack of knowledge and experience.

One of the greatest obstacles women attempting to perform their functions as managers have to overcome is being able to take a stand in the face of opposition and to do so in a manner that does not infringe on the rights of others. This is what assertiveness is about.

#### **BROAD AIMS OF THE MODULE**

This module is designed to assist women managers to:

- Understand what assertiveness means.
- Give practical tips on how to behave in an assertive manner.
- Acquire skills on how to deal assertively with other assertive individuals.
- Understand the fine line between assertiveness and aggression.

#### **UNDERLYING ASSUMPTIONS**

The module on assertiveness is based on the following underlying assumptions:

- Assertive, submissive or aggressive behaviours are based on the beliefs that people hold about
  - themselves, others and the world around them.
- One can only change behaviours by changing beliefs that one holds.
- Assertive behaviour is situation specific. It is always necessary to check your facts. (Standing your ground when you are factually incorrect makes you look stupid).
- Assertive people are confident people and reasonably self-assured. Belief and trust in one's own judgement is the basis of assertive behaviour.
- With attention and effort, aggressive or passive behaviours can be unlearned and assertive behaviour can be learned.
- Assertiveness goes beyond what is said. It includes non-verbal behaviour.
- Assertiveness is improved through practice.
- Assertive behaviour represents a state of balance with docile, non-assertive or submissive behaviours on one end of a continuum and aggressive behaviours on the other end.
- Both men and women experience problems of docility or submissive behaviour. Because of the history of South Africa, however, women are more prone to be submissive than their male counterparts.



## **UNIT** 1:

### **UNDERSTANDING ASSERTIVENESS**

Assertiveness is something that many women grapple with. Women are expected by society to be compliant, agreeable and to put everybody else first. This module will assist in facilitating the exploration of the interplay of factors that make it difficult for women to behave assertively. This module will also highlight the not so obvious difference between assertiveness and aggression.

#### **OUTCOMES**

After working through the unit, the woman manager should be able to:

- Distinguish between assertive, aggressive and passive or submissive behaviour.
- · Identify cultural factors that prevent women from behaving assertively.
- Apply the knowledge they gain to change their own behaviour.

#### WHAT IS ASSERTIVENESS?

Assertiveness means expressing your feelings, thoughts and needs without threatening others. Assertiveness involves:

- Standing up for your own rights without violating the rights of others.
- Expressing your beliefs, needs, wants, opinions and feelings directly in a socially acceptable manner.
- Being able to say 'no' without feeling guilty.

#### WHAT IS SUBMISSIVENESS?

Submissiveness or non-assertiveness means consistently giving in to others on contentious points. It is known also as passive behaviour. This involves being:

- Afraid that others will not like you if you disagree with them.
- · Unable to give and receive criticism.
- Silent when something bothers you.

#### WHAT IS AGGRESSION?

Aggression means putting yourself first at the expense of others. This involves:

- Feeling angry when others disagree with you.
- Forcing your point of view even if there is no logic in doing so.
- Feeling that you have to win no matter what.
- Consistently intimidating others.
- Believing that you are the only one who has something to contribute.



#### **EXERCISE**

Given the definitions above, categorise the following examples as submissive (SU) assertive (AS) and aggressive (AG) Write statements in the appropriate column in the table below:

(a) Giving in to the demands and needs of others to keep peace. (b) Balancing your needs and rights with the needs and rights of others. Putting forward your needs and rights at the expense of the needs and rights (c) of others. (d) Finding it difficult to express your feelings even though you are aware of how you (e) Expressing your feelings in a socially unacceptable manner. (f) Bullying others into accepting and respecting your feelings. Feeling awkward in receiving and giving compliments. (g) (h) Being arrogant in giving and receiving compliments. (i) Receiving and giving compliments gracefully. (j) Saying no for the sake of being different. (k) Comfortable in saying no when it is about something you realistically cannot do. (l) Feeling guilty when you say no. (m) Expressing your feelings in a manner that is respectful of self and others. (n) Getting angry and expressing your feelings in a manner that is disrespectful of self and others. (0)Remaining silent if something bothers you. (p) Reluctant to ask for help regardless of how unreasonable the task is. (q) Politely indicating that the task is big and asking for help. (r) Telling in a manner that is disrespectful that you will not do the task. (s) Would rather be feared than be liked.

Accepting that some people will like you and others will not like you.

Worried that others will not like you.

(t)

(u)

SUBMISSIVE	ASSERTIVE	AGGRESSIVE

Assertive behaviour goes beyond what is said. What is said is as important as how we say it. Even in total silence, our body language says a lot. Sometimes what is said is the opposite of non-verbal cues we give. Let us look at some non-verbal cues that are associated with assertiveness, aggression and submissiveness.

#### WHAT IS BODY LANGUAGE?

IDENTIFY WHAT THE FOLLOWING BEHAVIOURS COMMUNICATE					
BODY LANGUAGE					
Sits in a cramped, tense position; avoids eye contact; looks down; keeps stepping back; covers mouth with hands; nervous movements; a closed body posture of crossing the arms; tends to be fidgety.	Relaxed, upright body position; stands tall; open hands movement; palms outwards.	Bolt upright/leans forward; fist thumping or clenched; arms often folded; unapproachable.			
EYE CONTACT					
Steady and firm without staring.	Avoids eye contact, looks down.	Stares down and tries to dominate.			
FACIAL EXPRESSION					
Sheepish smile; blank expression to hide true emotions; laughs when others are laughing.	Relaxed, open features; frowns when confused or angry and smiles when pleased.	Jaw firm; wry, mocking smiles; angry scowls; eyebrow raised; chin thrust forward.			
VOICE AND SPEECH					
Usually fast higher pitch and may even shout.	Steady and clear tone with fewer hesitations and emphasis on important words.	Voice often soft; speech hesitant; tendency to mumble; slurred speech.			

**CAUTION:** A single isolated display of any of these behaviours does not mean anything. It is only when a pattern emerges because the behaviour happens over and over again that it may be an indication of a tendency to be assertive, aggressive or submissive.

#### SOME COMMON CAUSES OF SUBMISSIVE BEHAVIOURS

FEAR	FALSE BELIEFS	LACK OF SKILLS
Of hurting or displeasing others.	One is unworthy and therefore your feelings and thoughts do not matter.	Some people were either never taught to be assertive or were actively discouraged.
Of being rejected.	Belief that one should go with the flow.	Not being quite sure of what to do.
Of making mistakes.	Being assertive is unfeminine.	Lack of communication skills.
Of being considered masculine.	The boss is always right.	Lack of socially acceptable skills of expressing disagreements.

#### **EXERCISE**

- Do you hold any beliefs that prevent you from behaving assertively?
- Identify such beliefs.
- Do you lack certain skills and as a result you are never sure of what to do and how to react?
- If 'yes,' identify such skills.

#### SOME COMMON CAUSES OF AGGRESSIVE BEHAVIOUR

FEAR	FALSE BELIEFS	LACK OF SKILLS	
Feelings of worthlessness and powerlessness.	Desire to control others.	Lack of acceptable social skills.	
Belief that everybody is looking down upon you.	Belief that any disagreement is aimed at the person rather than the issue.	Lack of interpersonal skills.	
Feeling inadequate for the job.	Belief that any disagreement is a sign of lack of loyalty.	Lack of communication skills.	
Feeling that you do not compare favourably with your peers.	Expectation of unconditional support.	Lack of ability to look at an issue from different angles.	

#### ADVANTAGES OF BEING ASSERTIVE

There are some definite advantages to being assertive. Some of these advantages are highlighted below:

- Makes others take your needs, feelings and views into consideration.
- Enriches group activities such as meetings in which you express your perspective.
- Sharpens communication and thinking skills.
- Enhances self-respect.
- Improves self-esteem and your esteem by others.
- Assertiveness is a life skill that can be used across situations, at work, at home and with friends.

#### **EXERCISE**

THINK OF OTHER ADVANTAGES AND WRITE THEM BELOW			

#### POSSIBLE DISADVANTAGES OF ASSERTIVENESS

Depending on the context in which the woman manager works, assertiveness can have its disadvantages. In instances where the woman manager finds herself in a very conservative environment, assertive behaviour may have a negative impact. The possible disadvantages of assertive behaviour are listed below:

- Misinterpretation of assertive behaviour and possible negative reaction.
- Assertive behaviour happening too fast in an environment that is not ready for change.
- Assertive behaviour can be taken to extremes if one is not careful.
- Being labelled as "un-feminine", or "trying to be a man".
- Colleagues who are not ready to tackle an assertive woman manager may resort to back stabbing and subtle sabotage.

#### WHAT OTHER DISADVANTAGES OF ASSERTIVENESS CAN YOU THINK OF?

#### **EXERCISES**

Re-visit the tables above and identify what areas you will need to work on in order to reach an optimal level of assertiveness.

Enter what you select from this table in column 1 of the table below.

In column 2 indicate what possible actions you will need to take to achieve the desired outcome.



AREA OF IMPROVEMENT	ACTION TO BE TAKEN

### **EXERCISES**

FEAR	RESPONSE	CHARACTERISE BEHAVIOUR	MODIFY
1. A date is being set for the next meeting that you are very keen to attend. A date proposed and accepted by everyone else clashes with an important commitment of yours. When the chairperson asks if it is ok for everyone then you say	"Well alright, it seems to be convenient for everyone else."		
2. A parent knocks at the door in the middle of a lesson and demands to talk to you. You say"	"I would like to finish my lesson first and I will be happy to answer your questions."		
3. A colleague volunteers your services without consulting you. You respond by saying.	"Much as I do not mind helping, I am not available in the next 2 weeks for any- thing else other than my classes."		



Exercises continued...

FEAR	RESPONSE	CHARACTERISE BEHAVIOUR	MODIFY
4. A colleague undertook to perform a task for a task group that you chair. On the day of the meeting he does not show up. You call him up and say	"I am sorry to disturb you."		
5. A member of staff tells you she would like to take responsibility for after school enquiries. You say	"Why would you want to do that? You already have trouble keeping up with extra mural activities."		
6. In a meeting the chair- person makes a proposal that negates one of the earlier decisions made. You ask	"How does this proposal relate to a decision taken at a meeting of?"		
7. You are running late and a colleague asks you for a lift home that would make you go out of your way. You respond by saying	"I am not able to help as I am seriously running late."		
8. Last month you were instructed to attend a meeting that turned out not to be relevant to your subject area. You felt that another department in your school ought to have been represented. When you are reminded of the follow-up meeting you say	"I would like to attend but I am quite busy."		
9. You sat through a presentation and you thought it was inadequate. You say to the presenter	"I am not convinced you know what you are talking about."		



## **UNIT 2:**

# ASSERTIVENESS IN THE CONTEXT OF RIGHTS AND BELIEFS AND RIGHTS AND RESPONSIBILITIES

#### **OUTCOMES**

#### AT THE END OF THIS UNIT, PARTICIPANTS SHOULD BE ABLE TO:

- Understand the concept of rights and how it relates to assertiveness.
- Understand how beliefs influence behaviour.
- Understand the legislative framework in which women managers operate.
- Practically apply knowledge about rights, beliefs and legal provisions to hypothetical work situations.
- · Practice asserting themselves in a small group setting.
- Practice putting their point of view across in a report back session.

#### WHAT ARE RIGHTS?

The concept "rights" refers to what people are entitled to by law. These rights will remain cold in the statutes unless people are prepared to stand up for them when such rights are violated. This unit will attempt to clarify what rights people in general, and women in particular, have. Rights come with responsibilities and women managers need to be aware and respectful of their own rights as well as those of the people they work with.

#### **GENERAL RIGHTS**

In order to behave assertively in many situations in life, there needs to be acceptance that you and others have the right to:

- Your own opinions, views and ideas, which may or may not be the same as those of other people.
- Fair hearing of those opinions views, ideas.
- Express needs and wants that may be different or the same as those of other people.
- Ask that others respond to your needs.
- · Refuse a request without feeling guilty.
- Have feelings that you can express if you so choose.
- Be your own self.
- Have others acknowledge and respect your rights.

#### **LEGAL RIGHTS**

These derive from the Constitution of the Republic of South Africa and are further elaborated upon in different pieces of legislation:

- The Right to Privacy (Constitution and Labour Relations Act of 1995).
- The Right to Freedom of Expression (Constitution).
- The Right to Freedom of Association (Constitution and the LRA).
- The Right to Freedom of Movement (Constitutional Right).
- The Right to Information (Constitution, the Freedom of Information Act and the LRA).
- The right to assemble demonstrate and to choose to belong/not to belong to a labour union (Constitution/LRA).
- The right to a safe and healthy working environment (Occupational Health and Safety Act).
- Children have a right to learn (South African Schools Act).



#### EXAMPLES OF THE VIOLATION OF THE RIGHT TO PRIVACY

- · Eavesdropping.
- Opening/reading other people's mail.
- Searching someone's bag/pockets.
- Listening to someone's voice mail.
- Asking for references from previous employers without the permission of the job applicant (LRA).
- · Getting confidential medical history from a third party.
- Tapping phones.

#### **EXAMPLES OF VIOLATION OF THE RIGHT TO FREEDOM OF EXPRESSION**

- Staff not allowed to talk about certain issues (excludes character assassination).
- Staff not encouraged to express opposing views.
- Restrictions imposed in terms of whom the staff can talk with.

#### **EXAMPLES OF VIOLATIONS OF THE RIGHT TO INFORMATION**

(Excludes information that is of a confidential nature or classified. Balance this with individual right to privacy).

- Vague advertisement, which leads applicants not to understand the full scope of the job.
- Not giving employees that are charged for misconduct information about the charges or access to information they need to prepare for the hearing.

#### **EXAMPLES OF VIOLATION OF THE RIGHT TO FREEDOM OF ASSOCIATION**

- Preventing staff from belonging to a union.
- Harassing them for having joined a union.
- Preventing staff from forming a social club.
- Discouraging formation of social clubs that address minority concerns.

Rights come with responsibilities. Identify responsibilities that come with the following rights:

#### **EXERCISE**

RIGHTS	RESPONSIBILITIES
To be allowed to get on with your job in your own way once the specifications of the job have been clarified and boundaries defined.	
To have a say in selecting people who work within your immediate environment.	
To make innocent mistakes.	
To expect work of a certain standard from people working for you.	
To criticise performance of staff if it falls below certain standards.	



#### IN ORDER TO STAND UP FOR YOUR OWN RIGHTS ASSERTIVELY, YOU WOULD HAVE TO:

- Accept and respect the rights of others.
- Be selective about what rights to stand up for and when (choose your battles).

#### **BELIEFS**

Beliefs are general conclusions we reach about how things are, will be, or are supposed to be. They represent what we hold to be true, in the absence of any physical proof, of ourselves, of others and the world around us:

- I believe people can only change if they choose to (prone to assertive behaviour).
- I believe I am as good as everyone else (prone to assert oneself).
- I believe I am the best (prone to aggressive behaviour).
- I believe people (certain category, class, race, gender) are lazy (prone to aggressive behaviour).
- I believe I am useless (prone to submissive/non-assertive behaviour).
- I cannot handle aggressive people (prone to non-assertive behaviour).

#### THE EFFECTS OF BELIEFS ON BEHAVIOUR

	Beliefs you hold	
Consequences and interpretations		Rights you give yourself
	Determine your behaviour	

#### **EXAMPLE**

- If you believe that your ideas are as good as those of others, you will find it easy to express them and come to appreciate those of others.
- If you believe that your ideas are not as good as those of others, you will find it difficult to express them due to the belief that whatever you think is not good enough anyway.
- If you believe that your ideas are better than those of others, you will express them in a manner that is arrogant, aggressive and puts other people down. You are unlikely to be open to other ideas and you will find it difficult to deal with situations where your ideas are rejected.



#### **EXERCISE**

Small group exercise: Using the following legal rights enshrined in the Constitution as well as other legislation, list what the woman manager/leader can or cannot do in her dealings with subordinates according to what that law prescribes. Group discussion should last about 10 minutes as should report back

RIGHT	WHAT CAN BE DONE?	WHAT CANNOT BE DONE?
The Right to fair and equal treatment (Constitution).		
2. Freedom of association guaranteed by the LRA.		
3. Freedom of speech guaranteed by the Constitution.		
<b>4.</b> Right to access to relevant information that is not of a confidential nature.		
5. Right to a fair hearing in terms of disciplinary issues.		
Presumption of innocence until proven guilty.		
7. Right to a fair selection and recruitment procedure.		
8. Right to family responsibility time off.		
9. Right to a fair hearing.		
10. Right to remain silent.		

Your journey to becoming assertive will be enhanced if you understand the legal framework in which you work.



## **UNIT 3:**

# IDENTIFYING AND DEALING WITH BARRIERS THAT PREVENT WOMEN MANAGERS FROM BEHAVING ASSERTIVELY

#### **OUTCOMES**

After completing this unit, the participants should be able to:

- Identify and overcome personal barriers to assertiveness.
- Identify and overcome social barriers to assertiveness.
- Identify and overcome cultural barriers to assertiveness.
- Identify structural barriers to assertiveness.
- Identify personal problems that may prevent a woman manager from acting assertively.

Research is conclusive about the differences that exist between the male and female managers. Women managers bring to the position a feminine touch to their job in an environment that may not be ready to embrace them for who they are. This environment is made up of both men and women and research indicates that female managers experience problems not only from male employees, but from female employees as well.

Identifying barriers that prevent women managers from behaving assertively simply because they are women, goes a long way in improving in the area of assertiveness.

#### PERSONAL BARRIERS

A woman manager may be her worst enemy. Her own attitudes and beliefs about herself and others as manifested in her behaviour can prove to be her worst enemy. This is particularly the case if a woman manager believes that she is not good enough for the position or that any criticism is a personal attack. A feeling of inferiority makes women managers let everyone walk all over them instead of taking charge. The opposite of this is equally destructive, i.e. a belief that you know it all and nobody can tell you because you are the manager.

#### **ATTITUDE**

An attitude can be defined as a tendency to respond in a certain manner to situations either positively or negatively. A positive attitude towards self and others is critical in behaving assertively. It is a positive attitude that makes a woman not be too hard on herself and others.

#### TIPS TO DEVELOP A POSITIVE ATTITUDE TOWARD THE SELF:

A positive attitude allows me, as a woman, to realise that:

- It is okay to make mistakes. No one is perfect.
- · I cannot be good at everything.
- Asking questions does not make anyone look stupid. It is the best way to get the needed information.
- I can say "no" when I need to without feeling guilty.
- If I stand up for myself now and say exactly what I think and feel, it will be better in the long run.
- Just because I see this matter this way, does not mean that everybody should agree.



#### BELIEFS THAT ACT AS BARRIERS TO ASSERTIVE BEHAVIOUR

Certain beliefs may prevent a woman manager from acting assertively. Some of these beliefs may lead to aggressive behaviours while others may lead to submissive behaviours.

#### BELIEFS THAT ARE LIKELY TO LEAD TO AGGRESSIVE BEHAVIOURS INCLUDE:

- · Attack is the best defence.
- Aggression gets results.
- Other people cannot be trusted to do a good job.
- I am superior, I know best.
- Other people should stand on their own two feet.
- I must give as good as I get.

# BELIEFS THAT LEAD TO NON-ASSERTIVE OR SUBMISSIVE BEHAVIOUR INCLUDE THE FOLLOWING:

- I am not as important as others.
- Other people will not like me if I say what I think.
- To be agreeable is to be polite.
- Good girls suppress their needs.
- It is safer to keep your head down in times of conflict.
- I should always put others first.
- I need to do everything perfectly.

# ASSERTIVE BELIEFS PROVIDE A FOUNDATION FOR ASSERTIVE BEHAVIOUR. THESE INCLUDE THE FOLLOWING:

- I am largely responsible for what happens to me.
- In a very few instances in which I am not responsible for what happens to me, I can choose how to respond to what happens to me.
- I can change if I so want.
- I can initiate actions to achieve results.
- I learn from my mistakes.
- · Criticism makes me grow.

#### **EXERCISE**

What counter-productive beliefs do you hold and why do you think you have to change such beliefs?

BELIEF	WHY IT NEEDS TO BE CHANGED
I am the best	Prevents me from learning from others and makes others unwilling to contribute ideas.



#### **MODIFYING BELIEFS**

(Adapted from Beck and Beck 1999)

#### STEP 1: Identify your own barrier beliefs

This part is important because you may not be consciously aware of such barrier beliefs. Using the example provided, identify beliefs that you hold about yourself that prevent you from behaving assertively.

BELIEF	WHY IT NEEDS TO BE CHANGED
Only stupid people ask questions.	Colleagues asked questions and the discussions that followed led to revisiting the plan.

- STEP 2: Contrast the belief with specific instances where you have acted or behaved in a manner that is opposite to the belief. For example, if you hold a belief that you are not good enough, think of instances where you have exceeded even your own expectations.
- STEP 3: Checking your own beliefs against the beliefs of someone you trust and respect. Suppose you believe that only pushy managers get results, it might be helpful to check from a colleague you trust and respect what his/her belief is about getting results. This is best done face to face to allow explanation and further discussions about areas of disagreement. This may lead you to modify your own beliefs. As you achieve success with your newly found belief, it will be reinforced.

#### STEP 4: Acting as if you held the opposite belief.

Select an assertive belief that you would like to hold and:

- Identify the rights that you would give yourself and others if you held this belief.
- In what situations and with whom would you like to hold this belief.
- What assertive behaviours would you like to exhibit in handling the situation/persons?
- What would be the benefit for you for using these behaviours?

ASSERTIVE BELIEF:	My ideas count.
RIGHTS THAT I HAVE:	I have a right to be heard.  My ideas deserve to be considered.  Others have a right to accept/reject my ideas.
ASSERTIVE BEHAVIOURS:	In a meeting I will state my point of view.  If I have an idea about how certain aspects of my work/ school can be improved, I will write a proposal or discuss it with the right person.

#### IDENTIFIED GENDER DIFFERENCES BETWEEN MANAGEMENT STYLES

A "woman's touch" refers to the kinder, gentler approach associated with the feminine style. The following differences in style between women and men managers have been identified (Vicky Montgomery 1996):

- Most women are more people-oriented while men are more task-oriented.
- Most women are inclined to be emotional while most men tend to be logical.
- Women mostly focus on building relationships while men focus on conquering.
- Women managers are more sympathetic while men managers tend to be more aggressive.
- Men tend to thrive on status while women tend to seek support and acceptance.
- Women tend to be more lenient than men.

The style differences suggest that for men it comes naturally to behave assertively or even aggressively whereas the woman manager should learn to assert herself. This is considered a universal phenomenon.

#### THE "FEMININE TOUCH" AS A BARRIER TO ASSERTIVENESS

Gender differences between management styles of men and women are well documented.

- Fellow female employees may not accept the woman manager's authority.
- Male employees may not accept the female manager's authority.
- Female managers may be seen as friends, and not as managers, by other employees.

#### OVERCOMING BARRIERS TO ASSERTIVENESS CAUSED BY THE FEMININE TOUCH

- Start by behaving spontaneously.
- Observe the reaction of colleagues to your actions.
- Modify your own behaviour.
- Observe the reaction of colleagues to your new behaviour.
- Channel the reaction to the desired direction.

#### **EXAMPLE**

**Situation**: You are promoted to a position of principal in the same school that you taught for the past eight years. In the first meeting you are congratulated and the spirits are high. Colleagues address you in the formal meeting by your first name. You do not mind being addressed by your first name but you feel that the meeting should be given the structure and the dignity it deserves. In the first meeting you do not say anything about being



addressed by your first name or about staff speaking out of turn. You feel you want to accommodate everybody and the meeting overall ends up being chaotic. You worry that if the future meetings will continue in this fashion, the productivity thereof will be minimised.

#### STEP 2: Observation

- Meeting is chaotic.
- · People speak out of turn.
- The atmosphere is too casual.
- Productivity is minimal.
- No concrete resolutions are reached.
- No decision made about lines of responsibility.

#### STEP 2: Modifying your behaviour

- · Prepare for the meeting properly.
- Ensure that all logistics for the meetings are well co-ordinated.
- In the meeting, project a serious image that says: " We are in this meeting for business".
- · Start on time.
- · Open and conduct meeting formally.
- · Address colleagues by their formal titles.
- Staff will get a cue from you about the formality of meetings without being rigid.
- In cases where staff act out of turn, politely indicate that order is important in having productive meetings.

#### STEP 3: Observe staff reaction

Should it be necessary, make further modifications e.g. time, venue, generating of agenda items, etc.

#### THE EFFECTS OF CULTURE

South Africa is a multi-cultural country. A universal feature of African cultures is that they do not exist in their pure form. Much has been westernised. Not all western influences have been beneficial. In some respects tension and conflict arising out of the adoption of foreign cultural practices has corroded the original indigenous pure cultural form. This can be seen in many aspects of modern life. An off-the-cuff example would be the erosion of respect for women that characterised the typical traditional African settings.

Men and women who hold the values that consider women to be inferior to men are more likely to create difficulties for women managers. Such circumstances could result in men resisting the authority of a woman manager and perceiving attempts by her to assert herself in ensuring that strategic objectives are met as a desire to humiliate them. This problem is exacerbated if a woman manager holds the belief about herself that she is inferior to men. This creates a situation in which the female manager's beliefs prevent her from taking charge of a situation.



# WHAT WOMEN MANAGERS CAN DO TO OVERCOME THE CULTURAL BELIEFS THAT CONSTITUTE BARRIERS TO ASSERTIVENESS

# CHALLENGING YOUR OWN TRADITIONAL/CULTURAL BELIEFS ABOUT MEN AND WOMEN

# READ THE FOLLOWING SENTENCES AND TICK THOSE THAT REFLECT YOUR OWN BELIEFS

- · Men should lead and women should follow.
- Men work well under pressure.
- Men in general are emotionally stronger that females.
- Men are more reliable than women are.
- Men are more intelligent than women are.
- · Men work harder than women.
- Men should not be instructed by women.
- Women must always respect men.
- Men carry more authority than women do, even if both have the same title.
- It is disrespectful to argue with men.
- Women who assert themselves do not get marriage partners.
- A woman's place is in the kitchen.
- · Women are not made to lead.
- To be assertive is to be un-feminine.
- The family suffers if the woman concentrates on her career.
- Successful women end up in divorce.

# Which of the above beliefs do you hold to be true and what are their effects on your behaviour?

BELIEF	EFFECTS ON YOUR ASSERTIVENESS

#### Challenging or re-appraising one's beliefs or inner thoughts

Re-write those beliefs that you hold about yourself and think of instances where those beliefs were proven not to be true



BELIEF	INSTANCES WHERE BELIEFS ARE NEGATED

Do you still have a reason to hold on to that belief?

## **UNIT 4:**

# STARTING TO BE ASSERTIVE IN PRACTICAL SITUATIONS

Assertiveness is a skill and like any skill, it is perfected through practice. This unit will be divided into two sections. The first focuses on learning assertiveness in a relaxed setting. The emphasis then shifts to practising assertiveness in a situation that is personally challenging to the woman manager.

#### **OUTCOMES**

Upon completing this unit, participants should be empowered to:

- Make requests assertively.
- Disagree and state their views assertively.
- · Give praise assertively.
- Receive criticism assertively.
- Give bad news assertively.
- · Give criticism assertively.



#### MAKING REQUESTS

Identify statements that describe how you generally feel about making requests.

BELIEF SET 1	BELIEF SET 2
When making requests one puts o ers in a position where they canno refuse.	· ·
2. If people refuse my requests it me that they do not like me.	ans 2. Any refusal is a personal attack on me.
<b>3.</b> To ask or to make requests is a si of weakness.	gn 3. My needs are more important.
<b>4.</b> My needs are not that important s I need to give others a chance.	<ul><li>4. Other people must be pleased to help me.</li></ul>
5. If people do things for me it means I owe them.	<ol><li>5. I want my requests met almost immediately.</li></ol>
<b>6.</b> I do not want to be a nuisance so I won't ask.	<b>6.</b> My subordinates must understand that my requests are instructions put politely.

Is there a pattern emerging? Are the majority of your beliefs reflected in column 1 or 2?

#### **EXERCISE**

Discuss the implications of holding beliefs predominantly reflected in column 1. What do your discussions reveal about the other column?

#### **PHINTS FOR MAKING REQUESTS**

- Do not be apologetic. This makes the other party feel you have no business making the request in the first place.
- Be direct. State your request clearly and directly. Do not sell your request with flattery. Keep it short.
- Do not justify yourself.
- Give a reason for your request if you think it will help.
- Do not play on people's friendship or good nature.
- · Do not take refusal personally.

#### DISAGREEING AND STATING YOUR VIEWS

Any disagreement is an indication that the issue is looked at by different people from different angles. Before you get into a deep argument, always remember that people:

- Are entitled to have their opinions about any matter.
- They have a right to be heard.
- They have a right to accept or reject what they hear.
- Reality is not always black or white.
- Opinions are not necessarily right or wrong. They are merely different.





#### HINTS ON DISAGREEING AND STATING YOUR VIEWS ASSERTIVELY

State your disagreement clearly: "I do not agree with..."; "My experience is different in that..."; "I see it differently in that..."; "My interpretation of what happened is different in that..."; "I do not think that is what was meant. I think she meant..."

If you doubt what you see or read, express your doubts in a constructive manner: "I foresee a difficulty in that...", "We will need to find a way to get around..."

Use "I" statements to distinguish your opinions from facts and to distinguish your experiences from those of others: "As I see it ....", "I believe that...", "My experience is..."; "As far as I am aware..."

Be prepared to change your opinion in the light of new information: "In the light of the explanation given, I now think we should do X." or "In the light of new developments, I think we cannot continue as planned."

Give reasons for your disagreement if you think that will help others see the bigger picture: "If we do X as proposed, this will have a negative effect on Y in so far as..."

State what parts you disagree with: "I do agree with the principle that we must change our examination system but I do not believe that we can change now because we do not have enough time to put an alternative system in place."

Recognise other people's points of view: "I recognise that this will affect your school differently but in the interest of the district, I believe this should be done."

#### BENEFITS OF DISAGREEING ASSERTIVELY

- Logical reasons exist for a disagreement.
- Important points are being clarified.
- Different viewpoints are not lost.
- Disagreement provides others with an opportunity to revisit their points of view.
- Differences of opinion enhance the chances of gaining consensus.

#### **GIVING PRAISE**

#### Do you believe that?

- If you praise subordinates they will start relaxing?
- Subordinates are doing what they are paid for and do not deserve praise?
- If I praise them they will think there is something that I want?
- Praise does not serve any useful purpose because people improve by having their mistakes pointed out?
- Praising is for weaklings?

#### WHEN PRAISED DO YOU FEEL:

- · Embarrassed and uncomfortable?
- You do not know what to say?
- You feel like being put on the spot?
- You wonder what the person praising you wants?
- You think the praise is not genuine?



#### **CULTURAL DIFFERENCES IN HANDLING PRAISE**

The African indigenous culture is communal in nature. Group existence and well being is primary and the individual secondary. The group (clan) is emphasised rather than the individual. An implication of this on the African individual has been that individual achievement has been seen much more in the light of an achievement of the group as a whole. This perspective may make it difficult for people having such a culture to receive praise, the same way as westerners would. When giving praise, be aware of the possible cultural differences that can lead to what might seem to be unexpected or inappropriate reactions.

#### WAYS OF PRAISING SOMEONE INOFFENSIVELY

- Sincerity- Give praise only if you mean it.
- Maintain relaxed eye contact. Your body language must be consistent with what you say.
- Use 'I' statements. 'I think you handled that situation very well.'
- Praise should be given as soon as possible after the event or situation giving rise to it.
- Make your praise specific. 'I think it is very good that in the minutes you highlighted the resolutions.'

In a non-specific work situation, a number of people were praised by their manager. The following table is a summary of their different responses. Classify these as assertive, aggressive or submissive.

RESPONSES TO PRAISE	CLASSIFICATION
"Oh it was nothing much really."	
"I think you were good too."	
"Well I am not good at all. It is X who is brilliant at organising."	
"Well what can I say? I am the best."	
"You thought that was good. I thought it was second rate myself."	
"I am not sure how I came across. I was pretty nervous."	





#### **HINTS FOR RECEIVING PRAISE ASSERTIVELY**

- Simply thank the giver: "Thank you" or followed by title and surname or first name.
- Agree with or accept the praise. "I also thought the presentation went well".
- Keep your response short. "Thanks, I am glad you liked it".
- If you disagree with the praise still thank the giver and qualify your response. "Thank you, although we were a little mixed up when it came to graphs."

#### **GIVING BAD NEWS ASSERTIVELY**

This applies to situations where we, as managers, have to pass information, or convey unpopular decisions. This can include instances of:

- Informing individuals that you are not going to be able to do what you have promised.
- Informing a staff member that what they expected has not materialised, e.g. promotion.
- Announcing unfavourable policy changes.

#### **PHINTS FOR GIVING BAD NEWS**

- Take the initiative. Volunteer bad news rather than wait to be asked.
- Introduce the topic by referring briefly to the previous agreement, arrangement or situation.
- Give specific bad news. Highlight what has changed in clear terms. Explain what actions you have taken. Keep to the facts and be brief. Maintain eye contact.
- Indicate possible implications.
- Give staff or the other party the opportunity to ask questions for clarification.
- Give staff the opportunity to make suggestions about implementation.
- When passing bad news that you do not agree with, make your own position clear to the
  authorities and decide whether it will be wise to make your position clear to the person
  you are passing the bad news to (personal integrity and credibility).
- When approached about a rumour of impending misfortune, first check the person's understanding before following the above steps. In cases of misunderstanding, give correct information.

#### RECEIVING CRITICISM ASSERTIVELY

We all, at some point, find ourselves on the receiving end of criticism which may or may not be justified. Sometimes justifiable criticism feels unfair to us because of the way in which it is given. An aggressive manner, disrespectful or a personal attack, or criticism in front of other people – a manner that is inappropriate, waters down even justifiable criticism.

#### **EXAMPLES**

- "He /she is always nit-picking."
- "She is a master at blowing things out of proportion."
- "There he goes again."
- "Always ready to find something wrong."
- "He cannot help but put men/women down."
- "Oh I have messed up again."
- " What is wrong with me? I do not seem to do anything right."
- " I just cant' seem to get it right."

What is the impact of self-talk on the person receiving criticism? Modify your own self-talk to prepare yourself to receive criticism assertively.



### **PHINTS FOR RECEIVING CRITICISM ASSERTIVELY**

Get clarification as to what the criticism is about. This is particularly important, especially if the criticism is cast in broad generalities, e.g. "You are always lazy; sloppy; always making excuses. Rather say "It would be helpful for me if you gave specific examples of what you mean" Or "What do you think I should have done in that situation?"

If criticism is given in the form of a personal attack, try to separate in your mind the criticism that may be caused by a valid reason and how it is given. You may say "I recognise that I have been coming late, but I will appreciate it if you did not attack me personally.

#### **ACCEPTING CRITICISM**

Where criticism is justified and is delivered in an appropriate manner, it is assertive to acknowledge your own mistakes and take responsibility for your actions. You may say "I never looked at the situation from your angle. I realise I have made a mistake and it won't happen again." Say this only if you mean it.

If you disagree with the criticism, hear your critic out. If you are still not convinced that criticism is not justified, indicate that you disagree with the criticism. "I hear what you are saying, but I still believe that what I did was the best under the circumstances." "I hear your perspective, but I do not believe what I did is necessarily wrong."

Make reference to the future. Even if you disagree with the criticism, it still gives you an indication of how your boss would like you to behave in certain situations. In order to avoid future misunderstandings it will be in your own best interest to get an indication of whether his proposed approach would be the most desired way of handling similar situations.

#### **GIVING CRITICISM ASSERTIVELY**

Criticism is not an end in itself. It is a means to improving performance. So a woman manager must always be aware of what the criticism is meant to achieve.

#### RIGHTS IN RECEIVING CRITICISM

In a work setting, your immediate manager has a right to criticise your poor performance.

- The person being criticised has a right not to be humiliated. Negative criticism should not be an attack on an individual's dignity and self-respect.
- · The person being criticised has a right to privacy.

Acceptance of these rights by both parties paves way for constructive criticism.



RIGHTS	RESPONSIBILITIES
Right for the manager to expect good performance.	Criticise constructively.
Right of a manager to criticise a subordinate if performance falls below standard.	Provide necessary support to improve performance.
Right of employee to know what is expected of him/her in advance. To perform according to expected standards.	Give specific criticism with suggestions for improvement.
Right of employee to state his/her case in instances of perceived poor performance.	Take responsibility for own actions/ behaviour.

#### INTERNAL DIALOGUE OR SELF-TALK

Inner dialogue is that self-talk that we have with ourselves especially in times of trouble. Irrespective of whether or not you give criticism, and how you do it is a matter of both your past experiences and the inner dialogue that you have with yourself. Since you cannot change your past experiences, the best place to start would be to change your inner dialogue.

### Examples of inner dialogues of assertive criticism

RIGHTS	RESPONSIBILITIES
I cannot believe she has done the same mistake again, I will tell her I cannot believe how stupid she can be.	Just because Ms. Y has made a mistake, she has not forfeited her right to be treated with dignity.
What is the point of talking to Mr. X about this again? I have already spoken to him several times.	Since I have spoken to him already, I just have to remind him more firmly.
Well, I am not going to raise that issue with Mr. B as he will get mad and that will be very embarrassing.	Much as Mr. B will not like it when I raise this issue, it is my responsibility. I will just have to be firm with him.
Well, if I bring this matter up it will look petty, but if he does it again I will not tolerate it. I will take firm action.	I will raise this issue, no matter how small it may seem, in order to avoid further complications.



#### **GUIDELINES FOR GIVING CRITICISM**

**STEP 1:** Check that your inner dialogue is sound

**STEP 2:** Check that the criticism is justified and not a personal attack.

What is the issue: Ms Y has been late 3 times this week.

**STEP 3:** Introduce topic and reason

During the month of April, it is critical that children are prepared for the exams.

**STEP 4:** Make your specific criticism

"At this critical time, I have noticed that you have been late 3 times in this week alone".

**STEP 5:** Get a response to your criticism

"What is causing this? Did you realise that...? What has been the problem"?

**STEP 6:** Ask for suggestions to bring about desired change

"How can matters be improved?"

STEP 7: Summarise what needs to be done "So, let's agree that next time..."



#### **ROLE-PLAY**

Allow 5 minutes for preparation and 5 minutes for presentation

Receiving criticism that you do not agree with: You are a deputy principal in school X and during a two-week period of absence of the principal, you served as an Acting Principal. It so happened that that coincided with a demonstration of students at school that turned violent. In the circumstances, you decided that the only option you had in order to protect staff and property was to call the police. This action was criticised by the principal upon his return. You feel that although the manner in which the criticism was given is fine, the criticism itself is not justifiable.

**Giving criticism:** You are a departmental official working at the district office. A parent has come to complain about corporal punishment still being used at a school in your district. Assertively give criticism to the principal of such a school.

Accepting praise assertively: You have successfully completed a degree/diploma through private studies. Unknown to you, your boss decides to congratulate you in a staff meeting and he/she requests you to share with your colleagues how you did it with all the work and home pressure you were subjected to. Handle this situation assertively.

**Giving bad news (group):** You are a principal of a school. Your school has been understaffed since the previous year and in your attempt to motivate the teachers, you have promised them to do your best to get new posts approved. You received the bad news recently that no extra posts have been granted to your school. You are still postponing a discussion of this issue when one member of staff indicates that she has heard from the grapevine that your school has been granted two additional posts.

Give the bad news assertively in a staff meeting.



## UNIT 5:

# HANDLING OWN ANGER AND AGGRESSION AS WELL AS AGGRESSION AND ANGER FROM OTHERS

#### **OUTCOMES**

After completing this unit, participants should be able to:

- Understand what anger is and why people get angry.
- · Handle anger from others assertively.
- · Handle their own anger assertively.
- To handle everyday put downs assertively.

#### WHAT IS ANGER?

Anger is an acute emotional reaction caused by a number of stimuli, including threat, verbal attacks, disappointment and frustration. It is characterised by strong physical reactions such as sweating, lump in the throat, shivering etc. What causes the reaction is the individual's interpretation of what they observe.

#### **CAUSES**

- Anger may be a reaction to objective stimuli such as a real threat, verbal attack or disappointment.
- Anger can also be caused by a misinterpretation such as not hearing properly or hearing correctly but attaching a different meaning to what you heard.
- Unrealistic expectations in that you may, for instance, believe you will get the promotion and when you do not, you become angry.
- A poor sense of humour in that some people may take jokes literally or feel ridiculed.
- Negative self-talk, low self-esteem or general feeling of inferiority.

#### ROLE OF INNER DIALOGUE IN HANDLING ANGER AND AGGRESSION

Past experiences in handling anger and aggression determine future reaction. Consider examples in the "future reaction" column and determine if they correlate with the type of response.





SELF TALK	ТҮРЕ	YOU FEEL	FUTURE REACTION
When I exploded I made a fool of myself, and in future I will have to just keep quiet.	Faulty	Embarrassed, guilty, ashamed.	Non assertion
I got carried away. But he started it and got what he deserved. If he behaves like that again I will get mad.	Faulty	Justified	Future aggression
I am disappointed I let myself get into that screaming match. Next time I will take a deep breath before responding.	Sound	Disappointed about what happened but confident in your ability to handle similar situations in future.	Future assertion
I cannot believe I let him get away with that. I should have told him where to get off.	Faulty	Frustration, anger.	Future aggression
There is no need for her to be that abrupt. But, I suppose she is the boss, what can I do?	Faulty	Helpless, self pity and hurt.	Non assertive
I should have stood up for myself. Next time she is so aggressive I will stand up for myself.	Sound	Concern and some disappointment about what has happened, but confident about the future.	Future assertion

#### WHEN ANGER OR AGGRESSION IS PASSIVE

This is more difficult to deal with since the aggressor does not do or say anything and as such, it can easily be mistaken for non-assertive or submissive behaviour. When this happens it might be necessary for the woman manager to approach it using step 6 in the guidelines that follow.

#### **EXAMPLE:**

"During the past three months I have asked you to do a variety of things that you have not done. Every time when in following up I asked why you had not complied with my request you told me that you had forgotten. I have difficulty understanding how you can forget repeatedly. Help me understand why you forget so regularly and let us work out a way that will ensure that you remember in future."



#### **GUIDELINES FOR HANDLING AGGRESSION FROM OTHERS**

Below are practical steps for handling aggression from other.

**STEP 1:** Before replying, take a deep breath and establish sound inner dialogue.

**STEP 2:** Ask for clarification, using an assertive tone of voice.

**STEP 3:** Recognise feelings. If still not clear, point out that voice is getting stronger.

"At this critical time, I have noticed that you have been late 3 times in this week alone".

**STEP 4:** Point out discrepancy between your points of view.

**STEP 5:** State how you feel.

**STEP 6:** State possible consequences.

**STEP 7:** Cut off interaction and rise to the process level.





### UNIT 6:

#### **BEING ASSERTIVE UPWARDS**

#### **OUTCOMES**

#### AFTER COMPLETING THIS UNIT, PARTICIPANTS SHOULD:

- Be equipped to behave assertively with their senior management
- Be equipped with skills that they will need to monitor their own behaviour.
- · Have acquired the skills they need to deal with aggression from senior management.
- Have had an opportunity to practice contributing assertively to meetings.

# BELIEFS ABOUT SENIOR MANAGERS THAT ARE A BARRIER TO ASSERTIVENESS

- Management knows best.
- You will be victimised for saying what you really think.
- · Senior management decides what to do. They are not interested in our view.
- If you want to get ahead with your career, be a good girl.
- Senior management thinks you are undermining their authority if you speak up.

# ENHANCE YOUR ASSERTIVENESS BY MODIFYING YOUR BELIEFS ABOUT SENIOR MANAGEMENT

- Senior managers, like everybody else, do not know everything.
- · Senior managers are not out to get you.
- Senior managers may genuinely be interested in what you think.
- You are going to be respected for standing up for what you believe in.
- There are secured open-minded people who are senior managers and are willing to listen to what you have to say.

#### WHY PEOPLE ACT NON-ASSERTIVELY IN MEETINGS

- Fear of being unpopular.
- · Fear of being ridiculed.
- Fear of damaging relationships.
- · Lack of self- confidence.
- · Lack of communication skills.
- · Fear of being bullied.
- Strong need to conform.

#### RIGHTS OF MEMBERS ATTENDING MEETINGS

As a manager, you will find yourself in meetings, sometimes with senior managers. It is important to know and understand your rights and responsibilities as in to:

- State your opinions and put forward suggestions.
- Have these opinions listened to and considered.
- · Understand what is being discussed.
- Agree/disagree with suggestions put forward by others.
- Make your contributions without being interrupted by others.
- · Have minutes that accurately reflect what was said.



- Have access to the agenda in advance.
- Know roughly in advance how long the meeting is going to last.

#### ## HINTS FOR CONTRIBUTING ASSERTIVELY IN MEETINGS

The general rule of thumb is to make your contribution in a manner that promotes progress. Thus, you need to pay attention to your specific behaviours but also to practical consideration.

Using 'I' statements to put your views across helps in separating your personal opinions from facts and leaves the debate open for other views, e.g. "I have found that it just works easier to do it this way and not that way." In agreeing with other views or suggestions makes your support for ideas or views clear and concise. This prevents useful ideas from being ignored.

#### IN DISAGREEING AND STATING DOUBTS:

- Be constructive by indicating why you think it will be difficult to put a suggested idea in practice.
- Keep the disagreement in perspective by stating what you agree with and what you disagree with. For example, "while I agree with the idea of extra study time, I do not think it is practical to start earlier than 7:40".
- Give reasons for your disagreement such as this, "because learners are already battling to be on time at 7:40".
- Use non-confrontational language such as "I have had a different experience" or "I see it differently".
- Put forward suggestions and do not just disagree. Suggestions move the process forward by presenting alternatives to what is on the table.
- Ask for clarification before reacting to other people's ideas, making sure that you understand. Seek clarification by asking "have I got it right or do you mean XY".
- Always speak through the chairperson. To interrupt is rude. The only exception is when someone misinterpreted what you said and this is leading the discussion astray.
- Ask for a reaction when there is no response to your suggestion. Ask 'what do you think of my suggestion'. This is especially useful in prompting others to commit or come up with alternative suggestions.

#### PRACTICAL CONSIDERATIONS

- The timing of your contribution is important. It is while the issue is being discussed and not after the issue has been closed. State your disagreements while the issue is still being discussed.
- Avoid falling in with the majority. If you are still practising being assertive, it helps to take the first available opportunity to state your view to avoid being influenced by the popular or majority view.
- Decide on which issues you will stand firm on and how far to go.
- Choose your battles. If you try to be assertive on everything, you run the risk of dangerously raising your blood pressure. Also be prepared to give in after speaking your mind.
- Avoid dominating the meeting. Make sure that you give others a chance to speak as well.



### **UNIT 7:**

# IN SEARCH OF CONTINUOUS IMPROVEMENT – CONTINUING TO INCREASE YOUR ASSERTIVENESS

#### **OUTCOMES**

#### AFTER COMPLETING THIS UNIT, PARTICIPANTS WILL BE:

• Equipped with practical guidelines to follow in improving their assertiveness.

Becoming assertive is a life long process that takes you through different milestones. Assertiveness does not manifest itself to the same degree in all aspects of one's life. For example, one might find it easy to be assertive in work situations and that may not necessarily translate to assertiveness in intimate relationships. Your life-long journey to assertiveness will continuously unfold in a sequence of:

- Choosing your battles. Identifying issues or situations about which you want to be more
  assertive. Do you want to become more assertive in meetings, personal relationships
  or in your intimate relationships? The rule of the thumb in making such decisions is to
  ask yourself in what areas of life are your non-assertion or aggression most counterproductive.
- Preparing for these situations.
- Behaving assertively during these situations.
- Reviewing these situations and making the necessary adjustments.

Look at assertiveness as a process with all sorts of ups and downs and if you do fall, get up and pick up the pieces.

#### FACTORS TO BE CONSIDERED IN CHOOSING SITUATIONS

Choose situations that pose a moderate degree of challenge - not too easy and not too difficult - and look at the possible benefits of the consequences. If you stand up for yourself, will you gain the respect of a spouse, colleague or boss?

#### PREPARING FOR THESE SITUATIONS

- Be very clear about what you want to achieve.
- Clarify your and the other person's rights.
- Turn any faulty self- talk/dialogue into a positive one.
- Play out/practice in your mind the assertive statements that you will use during the course of the interaction (initially it might be necessary to jot down these statements).
- Predict possible hassles and work out responses to these.

#### BEHAVING ASSERTIVELY DURING THESE SITUATIONS

Preparation for such situations should give you a reasonable degree of healthy confidence to act assertively. Taking the first step should give a sense of control over the situation and allow you to steer the discussion in your desired direction. When you meet unexpected



obstacles you can buy time by:

- Using words or phrases like "well," "fine," "OK," "I see".
- · Responsive assertions in the form of seeking clarification or testing.
- Testing your understanding. "Do you mean..."
- 'What you are saying is..."
- Asking for time out, e.g. "I am not ready to deal with this matter right now".

#### **REVIEWING THE SITUATION AFTERWARDS**

When you think about situations you have been involved in be realistic about your failures and successes. Being unsuccessful can mean any of the following:

- Failing to maintain your assertion.
- · Not having enough information on the basis of which you assert yourself.
- The other person does not accept your assertion.
- Asserting yourself on a non-issue.

#### HANDLING UNEXPECTED SITUATIONS

When something very unexpected happens, it is always advisable to buy yourself time and consider how you would like to respond. Try not to be dragged into the situation. These situations are by their nature difficult, so do not be too hard on yourself, especially in the early stages of your journey to assertiveness.

SU	<b>A</b> 5	AG
Giving in to the demands and needs of others to keep peace.	Balancing your needs and rights with the needs and rights of others.	Putting forward your needs and rights at expense of the rights and needs of others.
Finding it difficult to express your feelings even though you realise how you feel.	Expressing your feelings in a socially acceptable manner	Bullying others into accepting and respecting your feelings.
Feeling awkward receiving and giving compliments.	Receiving and giving compliments gracefully.	Being arrogant in receiving and giving compliments.
Feel guilty when you say no.	Comfortable saying no when it is about something you realistically cannot do.	Saying no for the sake of being different.
Remaining silent if something bothers you.	Expressing your feeling in a manner that is respectful of self and others	Do you get angry and express your feelings in a manner that is disrespectful of self and others.
Reluctant to ask for help, regardless of how unreasonable the task is.	Politely indicate that the task is big and ask for help.	Tell in a manner that is disrespectful that you won't do the task.
Worried that others will not like you.	Accept that some people will like you and others will not like you	Would rather be feared than liked.





### SUGGESTED ANSWERS TO EXERCISE ON PAGE 4.

IDENTIFY WHAT THE FOLLOWING BEHAVIOURS COMMUNICATE						
BODY LANGUAGE						
Sits in a cramped, tense position; avoids eye contact; looks down; keeps; stepping back; covers mouth with hands; nervous movements; a closed body posture of crossing the arms low; tends to be fidgety.	Relaxed, upright body position; stands tall open hands movement; palms outwards.	Bolt upright/leans forward; fist thumping or clenched; arms often folded; unapproachable.				
EYE CONTACT						
Steady and firm without staring.	Avoids eye contact, looks down.	Stares down and tries to dominate.				
FACIAL EXPRESSION						
Sheepish smile; blank expression to hide true emotions, laughs when others are laughing.	Relaxed, open features; frowns when confused or angry and smiles when pleased.	Jaw firm; wry, mocking smiles; angry scowls; eyebrow raised; chin thrust forward.				
VOICE AND SPEECH						
Usually fast higher pitch and may even shout	Steady and clear tone with fewer hesitations; emphasis on important words.	Voice often soft; speech hesitant; tendency to mumble; slurred speech.				



#### SUGGESTED ANSWERS TO THE EXERCISE IN UNIT 1 ON PAGE 3

RIGHTS	RESPONSIBILITIES
To be allowed to get on with your job in your own way once the specifications of the job have been clarified and boundaries defined.	To keep within the boundaries and achieve what has been specified.
To have a say in selecting people who work within your immediate environment.	Not to abuse the right to advance personal agendas.
To make innocent mistakes.	To acknowledge the mistake, rectify and learn from it and not repeat it again.
To expect work of a certain standard from people working for you.	To let people know what the standards are, and measure their performance objectively.
To criticise performance of staff if it falls below certain standards.	Do so without personally attacking the person.
	Give an indication of how the person can improve.
	Recognise that there may be legitimate reasons for under-performance.



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment And Selection: Tools to assist women managers perform bet-

ter as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.





#### PREFACE: RECRUITMENT AND SELECTION

The recruitment and selection scenario in the field of education presents women managers with a double-edged sword. Women managers holding senior positions find themselves as interviewers. Owing to the limited number of women who have made it to senior management positions, these women managers tend to be loaded with recruitment and selection responsibilities, on an ongoing basis, in an attempt to create balanced selection panels. In order for such women managers to handle recruitment and selection activities in a manner that portrays them as professionals and that can withstand legal scrutiny, it becomes important that they know the do's and don'ts of recruitment and selection. This affords women managers an opportunity to behave in a manner that does not open the Department of Education or Provincial Departments to legal challenges.

On the other hand, women managers need to equip themselves with skills that are necessary for them to perform optimally as interviewees so that they can enhance their chances of climbing the career ladder.

The approach adopted in this module aims at equipping women managers with skills they need as both interviewers and interviewees. In this way they can become both skillful interviewers and interviewees, thereby ensuring skillful interviewing as an interviewer or as an interviewee.

The relevance of this module goes beyond women in management positions. The module hopefully presents relevant lessons for any woman seeking to enhance her chances of building a meaningful career.



### **EXPLANATORY NOTES:**

$\odot$	=	FACILITATOR'S INPUT/NOTES	-	This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.
	=	HINTS	-	This icon gives hints/tips about how you can handle the leadership management issues under discussion in

•	=	ROLE-PLAY	<ul> <li>This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who par- ticipated actively in the exercise.</li> </ul>

the unit.

=	EXERCISE	_	This icon	refers	to an	activity	that
			should be o	done in	dividua	lly or with	n oth-
			ers. The ex	ercise	is aime	d at assi	isting
			the particip	oants to	o apply	the acq	uired
			skills to a p	oractica	ıl situa	tion.	

=	CASE STUDY	-	This icon refers to an activity that
			depicts a real life situation. The partic-
			ipants are expected to do the case
			study as individuals or groups. It is
			designed to allow the individual to
			apply both personal experiences and
			information provided in the unit or
			module to come with a solution.

V	=	SELF-TEST	<ul> <li>This icon refers to an activity that should</li> </ul>
			be done on an individual basis. The
			answers to these activities are found in
			the contents of the unit/module.

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#### **SELF MANAGEMENT**

#### INTRODUCTION

This module aims to equip women managers with the skills they need to be effective and efficient interviewers and to help them perform better as interviewees. The intention is to serve both managers seeking employment and those seeking advancement in their careers.

For women to advance in their careers, they need to market themselves well. No less important, is the woman manager's ability to recruit and select individuals who will make a meaningful contribution to the team, irrespective of whether the potential employees will be appointed at school, district, provincial or national level.

Recruitment and selection processes have increasingly become subject to challenge as more and more people begin to assert themselves. For the employer, in our case the various provincial departments of education, the issue of recruitment and selection is made more pressing by the need for various provincial departments to deliver on their mandate of educating our nation. A healthy balance needs to be struck in recruitment practices between making sure that all the relevant legislation is adhered to and that the rights of all candidates are respected in the process on the one hand, while on the other hand, appointing individuals who can make a meaningful contribution.

The woman manager needs to be aware of the rights of interviewers and interviewees to the extent that she is able to respect these rights as an interviewer. As an interviewee, the candidate woman manager needs to assert her rights in cases where these are violated.

The broad aims of this module are therefore to equip women managers with the skills they need to recruit and select in a manner that:

- Leads to the selection of the best candidates for the position.
- Complies with the relevant legislation.

#### **BROAD AIMS OF THE MODULE**

Having completed the prescribed units in this module, women managers should know:

- The legal rights of the candidates or applicants.
- How to respect the rights of candidates in their selection.
- How to use interviewing techniques that allow women managers to select the best candidates for positions.
- How to sell themselves and highlight their strengths as interviewees.
- How to prepare and plan for a successful career.
- Understand processes, procedures and resolutions used to appoint candidates.



#### SECTION A: THE WOMAN MANAGER AS INTERVIEWER

#### **BROAD AIMS**

This section looks at the skills that the woman manager needs in order to recruit effectively. These include:

- Understanding the legal environment of recruitment and selection.
- Understanding the rights and responsibilities of the interviewers.
- Displaying insights into these rights by applying them in an interviewing role-playing session.
- Understanding measurement of behavioural attributes as an interviewing technique.
- Integrating the knowledge gained in a role-playing session.

### []NIT 1:

# UNDERSTANDING RECRUITMENT IN RELATION TO SELECTION

#### **OUTCOMES**

Having completed the unit, participants should have the competencies to:

- Distinguish between recruitment and selection activities.
- Apply the relevant legislation in their selection activities.
- Evaluate the adequacy of advertisements.
- Be aware of the departmental procedures relating to recruitment.
- Be aware of the departmental procedures relating to selection.
- Apply in practical exercises the theoretical knowledge gained.
- Become skilled at identifying the best candidate for the job.

#### WHAT IS RECRUITMENT?

Recruitment is the entire process that begins when a position becomes vacant and ends at assumption of duty when the new employee joins a provincial or national department of education. The recruitment process is regulated via a policy that spells out exactly what is to be done to recruit (select and appoint) a candidate to a position.

#### WHAT IS SELECTION?

Selection refers to a limited set of activities within the broader recruitment process and covers mainly the activities pertaining to short-listing and interviewing. Selection is an operational matter that must be executed within the existing policy framework.

The chances of recruiting and selecting the right candidate for the job are enhanced if the individuals constituting the selection panel share a common understanding of what the job involves and are competent interviewers. Ideally, a subject expert should serve on the panel.

#### WHAT IS SIFTING?

Sifting is a tool used for the purpose of preliminary screening of applications. Sifting is a process that is embarked upon after the closing date for applications to eliminate those



applications that do not fully comply with requirements and stipulated procedures. Different arrangements exist in provinces regarding responsibility for sifting.

#### WHAT IS SHORT LISTING?

Short listing is a screening process by which applications that have not been eliminated via sifting get to be further evaluated against the advertised requirements for inclusion in the group to be interviewed. In other words the candidates who meet the stipulated requirements are further screened to determine their suitability for being invited for interviews. The idea is to interview a number of candidates that is manageable in terms of both logistics and costs.

#### WHAT IS A SELECTION INTERVIEW?

A selection interview is a formal discussion between the selection panel and the candidate, which aims at establishing the suitability of the candidate in relation to the outputs of a particular job. This is a formal activity.

#### **EXERCISE**

#### UNDERSTANDING RECRUITMENT IN RELATION TO SELECTION

CLASSIFY THE FOLLOWING AS EITHER RECRUITMENT OR SELECTION ACTIVITIES ENTER THE LETTER REPRESENTING YOUR CHOICE IN THE APPROPRIATE COLUMN BELOW.		
A.	Negotiation of selection of new selection criteria for the appointment of educators.	
В.	Deciding on the roles and responsibilities of the different panel members.	
C.	Receiving and recording of applications submitted for a vacant position.	
D.	Deciding on the sequencing of candidates.	
E.	Putting together of a selection committee to conduct interviews.	
F.	Deciding on the sequencing of questions.	
G.	Deciding on the medium to be used for advertising vacant posts.	
Н.	Deciding on who will chair the selection panel.	
I.	Deciding on the composition of a selection panel.	
J.	Procedure to be followed to communicate the results of interviews to the appropriate office.	

#### **ANSWERS**

RECRUITMENT	SELECTION

#### LEGAL CONSIDERATIONS IN RECRUITING STAFF

This section examines the different pieces of legislation that the woman manager needs to adhere to in selecting a candidate for appointment to a post. Adherence to the law is one of the fundamental requirements of any successful career as a manager as this limits the possibility of a decision becoming subject to litigation.

#### **OUTCOMES**

Having completed the Unit, participants should be able to apply:

- Their understanding of the Constitution to the recruitment processes.
- Their understanding of the Employment of Educators Act in recruitment processes.
- The Labour Relations Act to recruitment processes.
- The Employment Equity Act to recruitment processes.

#### LEGAL FRAMEWORK

The Constitution of the Republic of South Africa

#### The Constitution:

- · Guarantees equality for all.
- · Prohibits all forms of discrimination.
- Guarantees respect for human dignity.
- · Protects citizens of the Republic against the invasion of their privacy.

Discrimination on any grounds is considered unfair, unless it can be proven that it was done to achieve a legitimate purpose.

Constitutional rights are not absolute, and other laws further define the implementation of these rights.

#### IMPLICATIONS FOR RECRUITMENT AND SELECTION

- Treat all job applicants the same. This is particularly important if there are both internal and external applicants.
- Treat promotion processes and procedures as separate from recruitment and selection procedures.
- Treat job applicants with dignity and respect in written, telephonic and face-to-face interaction.



- Confine reference checking to the referees provided by the applicant.
- In cases of other referees that the employer might want to contact, obtain the applicant's consent.

## THE EMPLOYMENT EQUITY ACT (EEA) AND RECRUITMENT

#### The Employment Equity Act:

- Promotes the advancement of groups of people who were previously disadvantaged i.e. blacks, women and people with disabilities.
- Considers women, blacks and people with disabilities as the 'designated group'.
- Requires employers, for our purposes, the Minister at a national level and the HoD s of education in the provinces, to come up with measures that will be used to accelerate the advancement of people from the designated groups.
- Prescribes that the Act should be applied in a manner that does not constitute an absolute barrier to white males.
- Defines Black to include Africans, Indians and Coloured peoples.

#### FAIR VERSUS UNFAIR DISCRIMINATION

The EEA has come up with a concept of fair discrimination. Discrimination is considered fair if it is based on:

- The inherent requirements of the job.
- A better-qualified non-designated person is overlooked in favour of a person from the designated groups who meets minimum requirements.
   Any form of unfair discrimination is prohibited

#### MAKING REASONABLE ACCOMMODATION

The EEA requires employers to make reasonable accommodation in order to attract and retain the previously disadvantaged and people with disabilities. The EEA defines disability as any long-term recurring physical impairment that substantially limits prospects for entry into and advancement in the employment of people with disabilities. This includes accommodating people with disabilities in the following manner:

- Modification of the work environment to make it accessible to people with disabilities.
- Provision of facilities and equipment that will make people with disabilities productive in the workplace.
- · Creation of a climate and culture that embraces diversity.

#### DEFINITION OF 'SUITABLY QUALIFIED'

The EEA suggests that there are different ways in which job applicants can be deemed to be suitably qualified, namely:

- Possession of the necessary formal qualifications.
- Possession of the necessary experience.
- Potential to acquire the necessary competencies within reasonable time.

NB. The application of this definition in the field of education will only be limited to administrative positions as the Council for Educators sets minimum standards for professional categories.



#### THE EMPLOYMENT EQUITY ACT AND PSYCHOMETRIC TESTING

Psychometric testing is prohibited unless the psychometric test used is

- · Valid for all applicants.
- Directly measures the inherent requirements of the job.

#### THE EMPLOYMENT EQUITY ACT AND MEDICAL TESTING

Medical testing is prohibited unless it can be justified in the light of:

- · Medical facts.
- Employment conditions.
- Fair distribution of employee benefits.
- Inherent requirements of the job.

# THE IMPLICATIONS OF THE EMPLOYMENT EQUITY ACT FOR RECRUITMENT AND SELECTION

Make sure that most individuals who serve on the selection panel have an understanding of how the employment equity plan is affected by recruitment and also that they have a basic understanding of what employment equity means and excludes.

Employment Equity, for example, excludes the following:

- · Hiring of relatives and friends.
- Hiring of incompetent people who happen to belong to the designated groups.
- Hiring of people because of their race and gender.

# RECRUITMENT IN THE CONTEXT OF THE LABOUR RELATIONS ACT (LRA) OF 1995

The LRA guarantees freedom of association. Job applicants cannot be victimised or prejudiced against for belonging to a labour organisation or union.

Job applicants are considered employees with all the rights enjoyed as such.

# RECRUITMENT IN THE CONTEXT OF THE EMPLOYMENT OF EDUCATORS ACT

Section 6(1) of the Employment of Educators Act, No 76 of 1998 provides that:

- (a) "The appointment of any person, or the promotion or transfer of any educator in the service of the Department of Education shall be made by the Director General, or
- (b) "in the service of a provincial department of education by the Head of Department."

For the purpose of determining salaries and other conditions of employment, the Minister shall be the employer of all educators.

In making appointments and filling any posts for educators, the activity must be guided by the principles of equality and equity and other democratic principles contemplated in the Constitution which include the following factors:

- The ability of the candidate.
- The need to redress the imbalances of the past in order to achieve representation.

The conditions set by the Employment of Educators Act cover permanent, temporary and special contract employment.



The SGB of a public school shall be the employer of all persons in the service of such a school for school-based positions created and funded by the SGB.

The appointment, transfer or promotion of any person in the service of the department shall be made by the Director-General.

The appointment, promotion and transfer of any person in the service of a provincial department shall be made by the HoD.

Any appointment, promotion or transfer can only be made on the recommendation of the School Governing Body (SGB) for school-based appointments.

The HoD can decline the recommendation of the School Governing Body (SGB) only if:

- Any procedure collectively agreed upon or determined by the Minister for the appointment, promotion or transfer has not been followed.
- The procedure followed does not comply with any procedure that was collectively agreed upon.
- The candidate is not registered or does not qualify for registration as an educator with the South African Council for Educators.
- Sufficient proof exists that the recommendation of the SGB or Council of a further education institution was based on undue influence.
- The appointment was not done within the prescribed time frame.

If the HoD does not accept a recommendation of the SGB/ Council of a further education institution, the SGB/ Council shall make an alternative recommendation.

#### IMPLICATIONS FOR RECRUITMENT

- The selection panel should be properly constituted.
- The selection committee only makes a recommendation it does not have the authority to hire.
- The selection committee therefore needs to keep the proceedings absolutely confidential.
- The selection committee cannot communicate with candidates about the outcome of interviews.
- Only a delegated official can communicate with the candidate, and then only after approval of the recommendation by the HoD/ delegated official.
- Consider latest resolutions and provincial arrangements

#### RECRUITMENTS IN THE CONTEXT OF THE PUBLIC SERVICE ACT

The woman manager in education has to deal with a variety of professionals and employees whose employment conditions are regulated by different pieces of legislation. In addition to educators, the woman manager has to deal with other employees whose conditions of employment are governed by the Public Service Act of 1994. The employment of personnel who are not educators within the Education Departments both at Provincial and national level is regulated by the Public Service Act.

Section 10 prescribes that in filling those positions that fall under the Public Service Act, persons appointed permanently in the Public Service shall be:



- South African citizens.
- Of good character.
- Comply with prescribed requirements in as far as the individual's condition of health is concerned.

**Section 13** prescribes that the period of probation shall be 12 months, unless in the case of an appointment, the person having to approve such an appointment directs otherwise.

#### **EXAMPLE:**

#### APPLYING THE APPROPRIATE LEGISLATION TO INFRINGEMENT

In the following example identify the law that is being violated or improperly applied:

The Constitution of the Republic of South Africa	A
The Employment Equity Act	В
The Labour Relations Act (LRA) of 1995	С
The Employment of Educators Act	D
The Public Service Act	E

#### **EXERCISE**

CIRCUMSTANCE/CONDITION	ACT
The chairperson of the governing body dominates the interview and at the end tells one of the candidates that they are hired.	
While a candidate tries to answer questions he is constantly interrupted by one of the panel members who tells the candidate rather rudely that his answers are irrelevant.	
A white male is asked why he bothered to apply because the vacant position is to be filled by a black candidate.	
A candidate who is known to the panel is offered different treatment and chats with the panel, mostly about other things rather than the questions for the interview.	
One candidate is told by the chairperson of the selection committee/interviewing panel that her track record speaks for itself and interviewing her is just a formality.	
A Director in the District officer insinuates to a candidate for an Assistant director's post that the probation requirement will be waived.	

CIRCUMSTANCE/CONDITION	ACT
A candidate who has been recommended by the selection panel is informed by the principal that she has been hired and decides that to catch up she can start working before she receives an official letter of appointment.	
The principal conducts the interviews alone and tells the SGB that it was urgent that the interviews be held.	
The principal asks a principal of the previous school about a candidate who has not indicated the previous principal as one of the referees.	
The chairperson of a SGB declines to recommend an otherwise good candidate because of the rumour that he is HIV positive.	
One of the panel members asks a candidate about his medical history in the interview.	
A candidate for a district based position fails to divulge his criminal record, and accepts an offer for a position.	



### UNIT 2:

### MEASUREMENT OF BEHAVIOURAL ATTRIBUTES AS A MECHANISM TO PROMOTE FAIRNESS IN RECRUITMENT

#### **OUTCOMES**

- Ability to define what the measurement of behavioural attributes means as a selection method
- An appreciation of the value added to the DoE and PEDs by recruiting the right people.
- The application in practical exercises of the knowledge gained.

A sound recruitment policy should strike a balance between legal issues in recruitment and the promotion of the interests of the DoE. A policy that ensures the recruitment of the best possible candidates for the job and integrates the different pieces of legislation including the Labour Relations Act and the Employment Equity Act against the background of the Constitution will achieve this. The Minister or MEC sets the policy. The selection panel merely applies the policy as these authorities have determined it.

Measurement of behavioural attributes leads to the selection of a candidate who best matches the job requirements.

#### WHAT DOES ASSESSMENT OF BEHAVIOURAL ATTRIBUTES MEAN?

In an interview situation the panel attempts to determine whether the candidate has encountered certain situations, how the candidate behaved in those situations and what the results were. In formulating the situation or case studies for purposes of the interview, one must concentrate on those that are most likely to occur in the job being applied for. In order not to unfairly punish candidates who lack exposure but may have the ability to do the job, candidates who have not been exposed are free to respond by indicating how they would deal with such a situation.

# WHY IS MEASUREMENT OF BEHAVIOURAL ATTRIBUTES A BETTER APPROACH?

- It is objective in that all candidates are asked the same set of questions.
- The questions are based on actual job outputs.
- It promotes fairness in selection.
- It requires candidates to translate the theoretical knowledge that they have.
- It promotes consistency in selection.

#### **UNDERLYING PRINCIPLES**

- Treat all the candidates the same. This applies to internal and external candidates and those known and unknown to the panel.
- The panel must treat candidates with respect and dignity.
- The panel must prepare thoroughly for the interview.



- Advertisements for the vacant position should cover all key aspects of the job.
- The panel must always be aware of contextual factors that affect delivery on the job and explore these in the interview.

#### **EXERCISE**

ANSWER THE FOLLOWING QUESTIONS THAT ARE IN A FORMAT THAT SEEKS TO MEASURE BEHAVIOURAL ATTRIBUTES.
Have you in your professional life needed to resolve conflict? Tell us what the situation was, what you did and what was the outcome of your actions?
Have you had to deal with a difficult colleague? Tell us what the situation was, how you reacted and what was the result of your action?
What is the most stressful situation you have handled in your work situation? Identify the situation, share with the panel what you did and what the results of your actions were?
What is the most serious staff room gossip you have needed to handle? Identify the situation tell us what you did, and what the outcomes of your actions were.
Have you ever needed to deal with late-coming of subordinates? Identify the situation, indicate to the panel what action you took and what was the outcome of your actions.
What was the situation, how did you deal with it and what was the result of your actions?

### **UNIT 3:**

#### **BEFORE SELECTION**

#### **OUTCOMES**

- An appreciation by women managers of the importance of recruitment and selection.
- Knowledge by women managers about exactly what they need to do to prepare for interviews.
- Knowledge and appreciation of the importance of a good job advertisement.
- Ability to draft good job advertisements.

#### UNDERSTANDING THE JOB CONTENT

The job content is captured in an advertisement that forms the point of contact between the applicants and the employer. The advertisement therefore needs to cover the essence of the job. All the key elements of the job need to be included. 'Job content' describes the full scope of the job. It is traditionally known as the job description. Unless the advertisement is clear about what the job requires, it is difficult for candidates to determine whether they qualify in terms of other attributes beyond formal qualifications. Furthermore, unless the selection panel is clear about what the job entails, it will be difficult to match what is to be done with the right candidate. The job content is specified at the stage of drawing up an advertisement and must spell out the following in addition to the academic qualifications required:

- The exact job details such as 'a qualified, senior primary school teacher, who will teach
  class X'
- To teach the following subjects.
- Contextual factors "the incumbent is required to participate in the following extra-curricular activities."

Contextual factors should highlight those aspects of the job that will be unique to a particular school. Is the school in question a farm school, boarding school or are there other unique circumstances that the aspirant employee would need to consider in applying? This might be helpful in eliminating those candidates who would not be eager to adjust to certain circumstances. Briefly describe the location of the school, to enable applicants to make informed choices.

Compiling the advertisement should be the responsibility of the immediate office to which the incumbent in that post would report because of the in-depth knowledge about both the context and the job that the immediate supervisor has.

#### CHARACTERISTICS OF A GOOD ADVERTISEMENT

A good advertisement allows the reader immediately to determine whether they qualify or not for the position being advertised. This is because a good advertisement is clear and specific about what is required and what is recommended. A good advertisement often facilitates the selection process by spelling out:

- The minimum requirement in terms of formal qualification and certification by a professional body.
- The minimum experience required in terms of both quality and quantity.
- The personal attributes required by the position.



- Contextual factors, e.g. co-ed, farm school, girls' school, etc.
- · Recommended attributes, if any.
- Give a clear indication of the Key Performance Areas.
- Should not unfairly discriminate.

#### **EXERCISE**

#### **DISCUSSION OF EXAMPLES OF ADVERTISEMENTS**

Participants should bring examples of the advertisements of their respective provincial departments to the workshop. These will be discussed in terms of the above criteria.



### **UNIT 4**:

#### PREPARATION AHEAD OF THE SELECTION INTERVIEW

#### **OUTCOMES**

- Understanding of preparatory work that needs to be done ahead of interviews and application thereof.
- Understanding of policy provisions that should guide interviewing.
- Understanding of roles and responsibilities in preparing for interviews.
- Being aware that failure to follow policy can invalidate the results of interviews.
- Understanding and appreciation of the fact that time needs to be invested to the interviewing process.
- Appreciation of the rights and responsibilities of the different members of the panel.
- Understanding and application of rules that apply to recruitment and selection.
- Appreciation of the importance of representative selection panels.

#### CONSTITUTING THE SELECTION PANEL

Consult the latest HRM circular for provisions relating to the composition of a school-based interviewing committee. The following is an example but it may change from time to time.

- One departmental representative, who may be the school principal, should serve as an observer or a resource person.
- The principal of a school, if he or she is not serving as a departmental representative, should serve on the committee.
- Three to five elected members of the School Governing Body, at least two of which are parents.
- A further one or two members, co-opted from outside the SGB on the basis of their expertise (They can be departmental officials).
- Observers from recognised Unions can intervene in relation to procedures and practices. The chairperson of the selection panel needs to give three working days notice to regional offices of each of the teacher organisations in question.
- At least one member of the school, who is an educator, and has no vested interest in the process.
- The Superintendent or their nominee shall serve as a monitoring, advisory or resource person for those positions that are equivalent or lower than that of their own.

Refer to the provincial specific arrangements if there are any.

#### RESPONSIBILITIES OF THE SCHOOL GOVERNING BODY IN INTERVIEWS

- Convene the first meeting of the interview panel where the chairperson of the selection committee or interview panel is to be identified. The chairperson should ideally be a member of the School Governing Body. At least two parent members of the SGB should serve as part of the interviewing panel.
- Ensure that the regional offices of the three recognised teacher organisations have been duly notified, as failure to do so can be grounds for a dispute being declared by teacher unions.



#### GUIDELINES FOR CONSTITUTING THE INTERVIEWING COMMITTEE

The selection panel must be balanced in terms of gender and race representation

#### COMPOSITION

The minimum requirements for the constitution of an adequate selection panel are:

- At least two members in a committee of three from the SGB/ Council of a Further Education Institution.
- At least three members in a committee of five from the SGB/ Council of a Further Education Institution.

This means that if the panel is not properly mandated by the SGB, the interviews will be deemed null and void.

#### MINUTES OF INTERVIEWING PROCEEDINGS

The interviewing panel appoints from amongst its members a secretary whose role is to take minutes. The school administrative clerk can type these minutes. The appointed secretary remains responsible for the accuracy of the final minutes.

#### **CO-OPTING RELEVANT EXPERTISE**

In cases where expertise does not exist within the panel as composed according to provisions of latest HRM Resolutions or later amendment, the SGB must ensure that the necessary expertise is co-opted.

#### WITHDRAWAL OF SELECTION COMMITTEE MEMBERS

A member of the selection committee who may be deemed to have vested interest by virtue of being related by blood or marriage to any of the applicants for a post must withdraw from the committee. This is applicable also to close friendships that might cause the impartiality of the panel member to question.

# LEARNER MEMBERS ARE PRECLUDED FROM PARTICIPATING IN INTERVIEWING COMMITTEES

This is mainly due to lack of experience and the fact that interviews are time consuming and would be to the detriment of learning by learners.



### **EXERCISE**

The chairperson of the SGB who happens to have been elected to chair the interviewing panel discovers a day before the interviews that one of the applicants for the post is his cousin who happens to be married to a cousin of another member of the SGB who was also elected to serve in a panel. What would you do to ensure that there is no conflict of interest and that the interviews continue as scheduled?
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Using your own SGB, put together a panel that will be acceptable and outline the procedures that you will follow before the interviews to ensure that all the role players are present at the interview.



### UNIT 5:

# ADMINISTRATIVE RESPONSIBILITIES PRECEDING THE INTERVIEW

#### **OUTCOMES**

- Equip women managers with skills they need to prepare thoroughly for the interviews.
- Help women managers design procedures to guide their preparation.
- Help them embark on the sifting process with objectivity.
- Equip women managers with skills they need to coordinate smooth-running interviews.

#### **RECEIPT OF APPLICATIONS**

- All applications should be received centrally and addressed to the individual mentioned in the advertisement.
- Receiving of applications centrally makes it easy to account for applications.
- Queries can be addressed easily through a central system of receipt.
- The person administering receipt of applications should keep a register detailing the date of receipt.
- Late applications should not be considered.

All applications received must be acknowledged within stipulated time frames.

#### **SIFTING**

The lines of responsibility for sifting are determined provincially. This is the very first step in the selection process. It involves rejecting those applications that can be deemed to be not in full compliance with the requirements, for example:

- Incomplete information either submitted on a form other than prescribed or not accompanied by a CV or missing important details.
- · Below minimum qualifications.
- Ineligible applicants such as post-retirement age or public servants having received voluntary severance packages.
- Non-compliant with the prescribed format or procedure.
- Do not meet minimum requirements in terms of experience.

The secretary of the selection panel/committee should generate a record of applications rejected at the sifting stage. Applicants whose applications have been rejected are duly notified. Under no circumstances can this group of applicants be considered, because rejection at this stage is due either to failure to meet minimum requirements or to disqualification due to some policy provision. This is not something the panel can compromise on.

It is the responsibility of the applicants to ensure that their applications provide all the required information to be considered. This includes the requirement of being received by the closing date.

#### **SHORT-LISTING**

This step follows after sifting and is a step that is meant to reduce the number of appli-



cants to a number of candidates that can be realistically interviewed. The main criteria in finalising this stage of the process are as follows:

#### THE REQUIREMENTS AS STATED IN THE ADVERTISEMENT

At times the large number of applications received makes it impossible to interview all persons interested in the position. The process of drawing up an advertisement should cater for this by also including recommended attributes. For example, if it is anticipated that too many applications will be received for the position of administrative officer, if only a matric is required, the pool of qualifying candidates can be further limited by including relevant additional requirements:

- Proficiency in X and Y software packages.
- Familiarity with the operation of a switchboard.
- Ability to communicate at all levels.

It is important that the recommended attributes are directly relevant to the job being advertised. The actual criteria for short-listing cannot come from outside the advertisement, otherwise the short-listing process can be open to legal challenge. Also keep in mind that there are no standard criteria for short-listing. Criteria for short-listing are derived from the individual advert, i.e.

- Nature of duties to be performed
- Seniority of position
- Context in which that job is to be performed.

#### TIPS FOR SHORT-LISTING

- Always remember to match criteria with job requirements and also consider whether the
  position is professional, such as a subject teacher, or administrative, such as a clerical
  administrative assistant, or managerial such as HoD /Deputy or Vice-Principal, Principal,
  or District/regional official.
- Does the applicant meet the minimum requirements as stated in the advertisement in terms of formal qualifications applicable to the position and required experience?
- If the pool of applications is still unreasonably high after using these criteria, recommended attributes come in handy.
- One must always be reminded of the need to strike a balance between fairness and transparency in selection and being cost effective.
- It would be unnecessarily expensive to interview 10 candidates for one position. The selection panel needs to use objective criteria to bring this number down to say five or six.
- The importance of confidentiality or secrecy of the short-listing process cannot be overemphasised.
- Be familiar with the latest HRM resolutions.

#### AFTER SHORT-LISTING AND BEFORE THE INTERVIEW

Short-listed candidates must be notified or inquire about

- Date and time of interviews.
- · Clear directions to the venue.
- Name of the contact person and telephone number.
- · Documents needed at the interview.



#### **EXERCISE**

Invite the participants to share with the group criteria that they use for short-listing in their own province. How can these be improved, given the knowledge gained in completing this unit?



### UNIT 6:

# PREPARING THE SELECTION PANEL ON THE DAY OF THE INTERVIEW

#### **OUTCOMES**

Having completed this module, participants should be able to:

- Know how to help the panel understand its role and responsibilities as a collective.
- Identification of roles and responsibilities of each individual panel member.
- Equip women managers with skills they need to conduct professional interviews.
- To help the panel members understand and respect the rights of the candidates.

# DISCUSSION AMONGST SELECTION PANEL MEMBERS A HEAD OF INTERVIEWS

The selection panel should meet at least one hour before interviewing the first candidate. The purpose is to prepare the panel for the task ahead. It is important to remember the following:

- Every member of the selection panel must add value to the selection process.
- There should be no overlap in the roles played by the members of the selection panel.
- The theme to be explored by different panel/selection committee members should be decided in advance.
- Within each theme the panel member is free to adjust questions when necessary.
- The golden rule is to allow panel members to select themes that they are most comfortable with.
- Panel members are free to ask follow-up questions for the purpose of clarification.
- The sequence in which the panel members will ask questions is decided in advance.
- The contextual fit or most common challenges that a candidate appointed to this position will encounter must be interrogated and these should be based on real challenges experienced in that environment. The following are examples of contextual factors:
  - · Resistance to change.
  - · High levels of conflict.
  - High levels of interference by the SGB.
  - Low staff morale.
  - High levels of absenteeism.
  - Conservative management.
  - Poor interpersonal relationships.
  - Sexual harassment.

The panel identifies contextual issues that the new recruit will face. The rule of thumb is to identify those issues that will be relevant to the environment in which the applicant will operate.

The aim is to determine whether the applicant will fit into the context in which the job exists. The underlying notion is that the more similarity exists between the values of the individual applicant and the values of the particular school, district office, etc. the easier the adjustment will be and the more likely that the new recruit will be happy.



The panel should identify the main requirements of the job that each one of them will explore during the interviews. Once these themes are identified, each panel member generates questions within the theme that they will explore.

#### THE ROLE OF THE CHAIRPERSON

The chairperson largely facilitates the interview by:

- Welcoming the candidate.
- Introducing the interviewing panel.
- Explaining the format of the interview to the candidate.
- Making sure that consistency is maintained across candidates.
- Making sure that all candidates are treated the same.
- Being attentive to the need of panel members for further probing.
- Clarifying those questions that may not be clear to candidates.
- Reminding the panel of what needs to be done should the need arise.
- Asking ice-breaking questions to get the candidate warmed up such as inviting the candidate to take the panel through the highlights of his/her career.
- Complete all the necessary paper work and submit it timeously to the relevant official.

#### **ICE-BREAKING QUESTIONS**

These questions are typically used in the beginning to put the candidate at ease and to make sure that the interview is structured such that it moves from the simple to the more complex. To get the interview started, the chairperson, after welcoming the candidate and introducing the panel, may ask the candidate to:

- Take the panel through his/her CV.
- Describe the highlights of his/her career.
- Cite a specific aspect of the candidate's CV and ask the candidate to elaborate.
- "According to your CV during the period 1979-1988 you served as Principal of YYY School. What was your major career accomplishment during that time?"

#### THIS APPROACH BY THE CHAIRPERSON IS VALUABLE IN:

- Easing the candidate into the interview.
- Determining whether there are any gaps in the candidate's CV which might need to be probed.
- Identifying if there is any falsification or inconsistencies in what has been presented in the CV.

#### THE ROLES OF THE PANEL MEMBERS IN GENERAL

The other members of the selection panel should:

- Treat all candidates with respect and dignity.
- Ensure that the agreed upon sequence of questioning is maintained.
- Stick to their themes, except in asking probing guestions and guestions for clarification.
- In cases where the candidate has addressed the question indirectly, re-phrase the question within the same theme.
- Evaluate responses given to all questions.
- Maintain a high level of interest across candidates.
- · Ask questions for clarification whenever necessary.
- Keep a record for the ratings of each candidate.



#### THE ROLE OF BODY LANGUAGE

Panel members should be aware and careful not only of what they say, but also of the message they convey to candidates through their body language:

- Maintain eye contact with the candidate without staring this signifies that you are interested.
- Do not talk too loudly this might intimidate the candidate. Neither should you speak too softly.
- Speak in a clear, even tone without too much hesitation. This confirms the impression that you know what you are talking about.
- Avoid doodling this creates an impression of boredom.
- · Acknowledge the candidate when introduced.
- Avoid nodding when you are impressed with the candidate's response.
- Avoid frowning if the candidate gives what you consider to be an incorrect answer.
- Do not laugh at the candidate's answer, no matter how ridiculous.
- Do not correct the candidate this can be embarrassing/humiliating.

# FORMAT OF QUESTIONS WHEN USING THE MEASUREMENT OF BEHAVIOURAL ATTRIBUTES AS AN INTERVIEWING TECHNIQUE

The actual questions asked are based on the attributes being measured.

#### THESE ARE EXAMPLES:

#### **ATTRIBUTE: Supervising subordinates**

• Can you indicate to the panel the situation you may have encountered in trying to supervise a difficult subordinate. Identify the situation; indicate the action that you took to resolve the situation and what the outcome of your action was.

#### Situation:

Action:

Results:

If the candidate does not conform to the prescribed format, politely bring to the candidate's attention what he/she is expected to do.

#### ATTRIBUTE: Dealing with difficult colleagues

• Can you recall a situation in a job situation where you had to handle a difficult colleague? Please identify the situation, the action you took and the results/outcome of your action.

Situation:

Action:

Result:

#### **ATTRIBUTE: Tolerance for stress**

 Can you recall the most stressful situation in your work environment? What caused your stress; what did you do to resolve the situation and what was the result of your action?
 Situation:

Action:

Result:



#### ATTRIBUTE: Managing diversity

What was the most difficult challenge you faced managing a diverse group?

- How was the group composed?
- What was the issue causing a problem?
- · What actions did you take?
- · What were the results of your action?

#### **ATTRIBUTE: Decision making**

- What is the most difficult decision you have had to take in your career life?
- · What was the situation?
- What action did you take?
- · What was the result?

#### **ATTRIBUTE: Leadership**

- Can you share with the panel instances in your career where you had to take control and lead?
- What was the situation?
- What action did you take?
- · What was the result?

#### **ATTRIBUTE: Attentiveness to detail**

- Can you share with the panel instances where your attentiveness to detail saved the Department embarrassment?
- What was the situation?
- · What action did you take?
- · What was the result?

#### **ATTRIBUTE: Financial management**

- Can you recall an instance where your financial management skills led to saving money for the Department?
- · What was the situation?
- What action did you take?
- · What was the result?

#### **ATTRIBUTE: Motivating subordinates**

- Can you recall a situation where your efforts to motivate learners/colleagues led to improved performance?
- · What was the situation?
- · What action did you take?
- · What was the result?

#### ATTRIBUTE: Dealing with sexual harassment

- Can you recall an instance where you had to deal with a sexual harassment complaint?
- · What was the situation?
- What action did you take?
- · What was the result?



#### ATTRIBUTE: Dealing with racism

- Can you recall an instance where you had to handle allegations of racism in your school/ directorate?
- What was the situation?
- · What action did you take?
- · What was the result?

#### ATTRIBUTE: Training and developing subordinates

- Can you share with the panel an instance in which you took initiative to develop and train a subordinate and it paid off?
- · What circumstances necessitated this?
- · What exactly did you do?
- What were the results of your actions?

#### ATTRIBUTE: Dealing with interpersonal conflict

- Can you recall a situation where your interpersonal relationships with a co-worker led to poor productivity?
- · What circumstances necessitated this?
- · What exactly did you do?
- What were the results of your actions?

#### **ATTRIBUTE: Administrative skill**

- Have you experienced a situation at work where your administrative skill led to improvement of performance of your team / division?
- · What circumstances necessitated this?
- What exactly did you do?
- · What were the results of your actions?

#### ATTRIBUTE: Ability to sell ideas to others

- Have you ever successfully sold an idea to your team?
- What circumstances necessitated that you think of a new idea?
- · What exactly did you do to make others believe in your idea?
- What were the results of your actions?

#### ATTRIBUTE: Ability to delegate

- Can you think of an instance where you made it easier to achieve a work-related objective by delegating?
- · What circumstances necessitated this?
- · What exactly did you do?
- What were the results of your actions?
- When you delegate tasks to individuals/a team how do you go about doing it?
- Under what circumstances do you delegate?
- How do you go about deciding whom to delegate the tasks to?
- · How do you make sure that the task that has been delegated is actually done?



#### **ATTRIBUTE: Budgeting**

- · What method of budgeting have you used in running the affairs of your school/office?
- · What is the result of your budgeting actions?

#### **ATTRIBUTE: Planning**

- Can you share with the panel how you go about planning for the activities of your school/department/regional office?
- What exact actions do you take in planning for the year, and what are the results?

#### **ATTRIBUTE: Community involvement**

- How do you ensure that the community gets involved in the various activities of the school?
- Identify situations that require community involvement.
- Describe how you went about getting the community involved.
- · What was the result of getting the community involved in school activities?

### QUESTIONS ABOUT THE PROFESSIONAL ASPECT OF THE JOB

(To be asked by an expert in the field)

- Can you identify a couple of situations in your professional life where your understanding of Maths / Accounting / Finance / HR / helped to prevent a crisis?
- Which method of doing X do you most prefer and why?
- What is the latest trend in doing B and what do you think of it?
- What has been the proudest moment in your career and why?
- What do you consider to be the most important challenge faced by HoDs of subject X and why?

# ATTRIBUTES ON WHICH PANEL MEMBERS RATE CANDIDATES BY MEANS OF OBSERVATION

- Confidence.
- Communication.
- Appearance and deportment.
- Etiquette, manners or manner of addressing oneself.
- · Listening skills.
- · Recognition of importance of keeping time.
- Seriousness of the candidate.
- Grooming and observance of dress code.

The panel members observe the candidates on each one of these attributes and rate them accordingly.

#### SEQUENCE OF ACTIVITIES IN SELECTION INTERVIEWING

- Introduction and welcoming of the candidate.
- Introduction of the panel members.
- Brief description of the process:
  - Panel members take turns asking questions.
  - Follow-up questions/questions for clarification if any.



- Candidate given an opportunity to ask questions.
- The chairperson explains the process going forward.
- Conclusion.
- Interviewing by all panel members following the agreed upon sequence.
- · Discussion of candidates.
- Making of a selection decision, i.e. recommend/not recommend a candidate for appointment.
- · Collation of all the relevant documents and sending them to Regional Office.

#### SCRIPT FOR THE CHAIRPERSON

#### **OPENING AND WELCOME**

(Introduction of the chairperson to the candidate)
I am Mr./ Ms./ Mrs. X. I have been tasked by the SGB to chair the interviews.

(Introduction of the candidate to the panel)
It is my pleasure to present Mr., Mrs. Ms. B to the panel.

(Introduction of the panel to the candidate)

Mrs. R representing the SGB Ms. L representing the SGB Mr. M departmental official Mr. K representing the SGB Ms. P representing educators

Mr. F co-opted expert Mrs. W the principal

#### **EXPLANATION OF THE PROCESS BY THE CHAIRPERSON**

We are constituted as a selection committee to look into the candidates who have applied for position Y. We are going to be seeing quite a number of candidates. The interviewing process will be as follows:

I in my capacity as the chairperson will open by asking you a couple of warm-up questions. After that I will give each one of the members of the panel an opportunity to ask you questions. The format that we shall follow involves asking you to tell us about a situation which you may have encountered. Please identify the situation, the action that you took as well as the results of your action.



#### **EXAMPLE**

Can you recall a situation where you took initiative to induct a new employee? In this situation, what exactly did you do and what was the result of your action?

#### **SITUATION**

The situation may be that a new employee had received no induction and was asking about this and that as she encountered different situations. I realised that she was getting frustrated as some colleagues were not too keen to help.

#### **ACTION**

I offered to stay behind with her on Friday afternoon and informed her that if there was information she urgently needed she could ask me, but if it was not urgent she could make a note and we deal with her queries on Friday.

#### **RESULT**

I then prepared a file of all the administrative procedures, and compiled a list of how to get different things. At the agreed upon time we met and went through the file and answered whatever questions she had. She was very grateful and she started functioning more efficiently in the week that followed. She felt that she had a better understanding of how things worked and that speeded up her adjustment to the school/regional office, etc.

#### CHECKLIST FOR INTERVIEWING PANELS

The Chairperson of the Selection Committee/Interviewing Panel must make sure that the following steps have all been followed:

- Introduction of the candidate to the panel.
- Chairperson introduces him/herself to the candidate.
- Introduction of the interviewing committee members to the candidate.
- Explanation of the process to the candidate and emphasising the candidate's right to ask for clarification if there is a need.
- Panel members maintain interest in the candidate throughout.
- Panel members convey positive body language.
- · The tone of the interview is non-stressful.

The chairperson must emphasise to the panel that:

- The decision of the panel is binding on all members.
- The selection proceedings are kept absolutely confidential.
- Document the whole process.
- Records of all selection proceedings to be submitted to the appropriate office.
- Only the DOE official, whether provincial/ national, can communicate selection decisions



#### **DURATION: 30 MINUTES**

Participants will be provided with a real advertisement for the post that was once advertised within the provincial/national department. The participants will split themselves into the following roles:

Chairperson

Members of the selection panel (5)

Candidates (3)

The rest of the participants will serve as process observers who will give feedback to the role players about how they performed.

#### **ROLE-PLAY**



### **UNIT 7:**

# PREPARING WOMEN MANAGERS TO TAKE UNPOPULAR RECRUITMENT AND SELECTION DECISIONS

#### **OUTCOMES**

- Highlight issues faced by women managers in recruitment and selection.
- Give women some self-affirmation statements that can help them deal with situations they face.

#### **EXERCISE**

Because of the tendency towards caring, supporting and reaching out, female managers often find taking recruitment and selection decisions particularly stressful. Here are some of the attributes that female managers generally possess that can make selection even more strenuous:

(Using the following rating scale, indicate how frequently you experience feelings reflected in the following statements: Often =1, Sometimes=2, Rarely=3)

STATEMENT	RATING
I feel confused in sifting and short-listing because I would like to give all applicants a chance.	
I know how scarce jobs are and it makes me feel sad that other people are rejected.	
I often cannot help but assist the candidates if they cannot give right answers because I know they know the right answers.	
I feel obliged to make the candidates less stressed during interviews.	
I just think the idea of a panel interview is so unfair for candidates.	
At times I go overboard to accommodate the candidate to the irritation of my colleagues.	
I often try to come up with the easiest possible questions for candidates to make things easier for them.	
I often feel like intervening when the selection panel asks too many difficult/ irrelevant questions.	
I have been accused before of mothering the candidates.	
My sympathy for candidates often prevents me from doing justice to the process of interviewing candidates	

If you have answered "Often" to 5 or more of these questions, you may be having difficulty coping with the exclusionary nature of selection and recruitment.

The inclination to help and to accommodate is stronger in women than it is in men. This can make women feel bad or guilty about having to take certain decisions that are crucial for ethical, legal and fair recruitment and selection processes. The following section presents affirmation statements that women who experience guilt about taking sound recruitment and selection decisions can use.

#### **BEFORE THE INTERVIEW**

#### TAKING OBJECTIVE DECISIONS

- The tendency to want to give everybody a chance that can make selection panels invite too many candidates for interviews.
- Leniency when it comes to deadlines that can lead to late applications to be sneaked in.

#### **SELF-AFFIRMATION**

Rules are rules. They apply to everybody

I am not responsible for setting the rules. I am only responsible for implementing them.

By bending the rules I create other problems.

The applicant has responsibility to abide by the set deadlines.

#### **NOT FINDING TIME**

You feel that more time needs to be spent in preparing for the interviews, but you just do not seem to be able to find it.

#### **SELF-AFFIRMATION**

I will never find the time to prepare for the interviews unless I make it.

On such and such days and time I will remove everything from my table and prepare for interviews.

#### WANTING TO HELP

As a woman you feel compassion towards the candidates and from time to time your inclination to help leads you to believe that the candidate does not understand the question, and it is not that he/she does not know the answer.

#### **SELF-AFFIRMATION**

If the candidate does not understand the question, he/she has a right to ask for clarification, and he/she must exercise that right and not me.

I have no right to ask any question on behalf of any candidate.



#### CONTROLLING YOUR FEELINGS AND EMOTIONS

You battle to hide your emotions and feelings about the answers given by candidates. This makes you to want to smile when a good answer is given and frown when what you consider to be a bad answer is given.

#### **SELF-AFFIRMATION**

It is not my responsibility to give candidates clues. I must maintain a neutral body language at all times.

#### BEING SUPPORTIVE OF FEMALE CANDIDATES

You identify with what female candidates are going through you, as you have been there yourself. You are inclined to be friendlier, gentler to them than to their male counterparts.

#### **SELF-AFFIRMATION**

Every candidate has a right to be treated fairly and with dignity and respect.

By treating female candidates differently I am unfairly discriminating against male candidates.

I will make this an empowering experience to female candidates by encouraging them to stand on their own feet.

#### **RESIST MOTHERING CANDIDATES**

You feel for the candidates in general and you want them to feel very comfortable and you try to think of all sorts of things to do to make the interviews a pleasant experience.

#### **SELF-AFFIRMATION**

All the candidates invited for interviews are adults who qualify for this position.

They do not need any mothering.

#### **ASKING UNCLEAR QUESTIONS**

When it is my turn to speak I feel threatened and forget what I want to say; and I end up not making my point clear. This often confuses the candidates.

#### **SELF-AFFIRMATION**

I will write my questions down, take a deep breath before asking the question and pace myself such that I concentrate on what I am saying rather than on other people.



#### OTHER PANEL MEMBERS DO NOT BELIEVE IN ME

I can tell by the look in their faces that other selection committee members do not believe I can effectively chair the interviews.

#### **SELF-AFFIRMATION**

I may not be perfect in doing this task but perfection comes through practice. I am going to do my best and I can do this as long as I prepare myself thoroughly.

#### **COMMUNICATION**

I often speak too softly or too loudly, much to the annoyance of my fellow panelist.

#### **SELF-AFFIRMATION**

I can practice before the interviews to regulate my voice such that everyone hears what I say without needing to repeat myself. I will also pay attention to other people's facial expressions and adjust accordingly.

#### MAINTAINING INTEREST AND ATTENTION

I often find my mind wandering after the first candidate and I begin to think about other things.

#### **SELF-AFFIRMATION**

On the day of the interview I will entertain no interruptions, and I am not available for anything else. Anything else that needs to be done immediately I will delegate.

#### **EXERCISE**

From the group of workshop participants constitute a selection panel and decide on the different roles of the individual members. Allow one participant to serve as a candidate and 5-7 participants to serve as a selection panel. Use measurement of behavioural attributes as an interviewing tool. The rest of the panel members should observe the interviewing session and record what they see with the aim to give the panel constructive feedback at the end of the session.



#### SECTION B: THE WOMAN MANAGER AS CANDIDATE

#### **BROAD AIMS**

- Equip women managers with skills they need to adopt a winning attitude.
- Equip women with skills they need to improve their performance in recruitment and selection activities as interviewees.
- Provide women managers with the knowledge they need to embark on lifelong career planning.

### **UNIT** 8:

#### PREPARING TO CLIMB YOUR CAREER LADDER

#### **OUTCOMES**

- To sensitise women to become aware of the preparations they need to succeed in their careers.
- Provide examples of how to do it.
- Allow the participants the opportunity to practice what they learn.

#### PREPARING YOURSELF FOR A BRILLIANT CAREER

If you have an ambition to reach new heights, that is not something that happens automatically or something that can be left to chance. You have to work at it.

The first step is to decide where you want to be and start working towards it. In the education field there are requirements that are stated for different post levels. By knowing what requirements are set, you will be in a position to realistically assess your preparedness for the position you aspire for and to do something about it.

# WHEN YOU MEET THE MINIMUM FORMAL QUALIFICATION REQUIREMENTS Meeting all the requirements means that you:

- Know what the minimum required formal qualifications are for the position you aspire to.
- Already possess the required formal qualifications.

This enhances your chances of being short-listed.

#### WHEN YOU DO NOT MEET THE MINIMAL QUALIFICATION REQUIREMENTS

If you do not already possess the necessary minimum qualifications, begin to empower yourself by acquiring the necessary minimum qualifications. The fact that you do not have what is required should be a source of encouragement for you to improve your qualifications, rather than a reason to discourage you from aspiring to higher positions.

#### DETERMINE WHETHER YOU MEET OTHER REQUIREMENTS (EXPERIENCE)

Should you meet the necessary experience requirement needed for the post, you have booked yourself a place in the interviews for the position you aspire to, provided that you present this accurately in your CV/ application form.



Should you not meet the experience requirement, strive to acquire not only the quantity of experience as defined by the number of years but also the quality. You can enhance the quality of your experience by volunteering to do certain things, by helping whenever help is needed and by taking every opportunity to broaden your exposure.

#### INFORMING YOURSELF

People who succeed in their careers are people who keep themselves informed of developments in their specific fields, in their profession, and in general. Keep abreast of what is current. Read, read and read. Informed people are empowered people.

#### READ PROFESSIONAL PUBLICATIONS/JOURNALS

Influence your school/district office/Provincial Office to subscribe to professional magazines, newspapers, journals, etc. Whenever there is a new law/amendment that affects your profession, make sure that you influence your school principal/district office, etc. to provide a copy thereof.

#### PARTICIPATE IN PROFESSIONAL ACTIVITIES

Professional organisations are an excellent resource and provide a networking opportunity for people in the profession. Make use of this resource to your benefit. Mingle with people who experience the same problems as you and learn from them as much as they learn from you. In the context of professional bodies, it would be relatively easy to identify a person whose behaviour you would like to emulate. Approach this individual and find out if she/he would be interested in being your mentor.

#### **BUILD YOUR CV**

Building a brilliant CV means going beyond what your current job requires. It means being constantly on the lookout for opportunities to become a better person and seizing these opportunities when they do come. It means getting involved in non-remunerative activities and playing an active role in the community and in professional bodies.

#### SUPPLEMENT YOUR CV WITH A PROFESSIONAL PORTFOLIO

A professional portfolio, if properly designed, provides you with an organised summary of:

- Accomplishments.
- Breadth and depth of experience.
- Proof of your ability to perform.
- · Personal development activities.
- · Professional development.
- · Community service.
- Awards, commendations and thank you letters.

#### SEE OBSTACLES AS OPPORTUNITIES

Obstacles that you come across present you with an opportunity

- To see things differently,
- To do what you have not done before.



Either way, this presents an opportunity for you to grow. When you fall, learn from your mistakes. Get up and pick up the pieces. What distinguishes successful people from less successful people is the ability to learn from one's mistakes/ misfortunes and the ability to regroup and re-strategize after falling.

#### BUILD YOUR VALUES AROUND THE DOE AND YOUR PDE S

If your values are in synchrony with the culture of your organisation, you move in harmony and in one direction. It becomes easy for you to be interested and to dedicate yourself to the organisation. If your values are not in line with the organisational culture, you are going to battle to keep your interest.

#### GO BEYOND THE CALL OF DUTY

This often makes you visible, and decision makers take notice. If the intention is to take the DoE whether provincial/national, to new heights, decision makers cannot afford to ignore women who add value to the Department.

#### PROJECT A WINNING ATTITUDE

If you appear apologetic, unsure and undecided, nobody will take you seriously. Adopt a winning attitude that says: I can do it! Even if I encounter obstacles they can be overcome. I have all the necessary ingredients for success. All that I need is the opportunity to do it. You will be surprised at how many of these suggestions you are already following without paying attention to documenting them.

#### **EXERCISE**

Go to the list of different things that you need to do to build your career. List those that you have already done or are still doing under the "Done" column. List those you still need to do in the "To do" column. Think of concrete steps that you are going to do to accomplish what you have not done.

DONE	TO DO



LIST PRACTICAL STEPS THAT YOU NEED TO TAKE TO TAKE YOUR CAREER TO NEW HEIGHTS.



### UNIT 9:

#### **BUILDING AN ATTRACTIVE CURRICULUM VITAE**

(Workshop participants must bring copies of their CVs)

#### **OUTCOMES**

At the end of this unit, participants should be able to:

• Compile a Curriculum Vitae that is properly laid out.

The purpose of any CV should be to attract the attention of the selection panel and to win you an interview. To accomplish this objective a CV should be well presented and in addition it should be complete and accurate. There are basically two types of CV designs: the chronological design that lists the main activities in a chronological sequence, often starting with the most recent and going back or starting in the distant past to present; and the functional format that focuses on the outputs of various positions held.

#### PERSONAL INFORMATION AND YOUR RIGHTS

Certain laws protect job applicants. The Constitution, for instance, protects the rights to privacy, to non-discrimination and to just and fair treatment of every citizen including job applicants. The protection of these rights restricts the information that the employer can seek from the applicants. The implication is that the employer can only seek job-related information. Information about the number of your dependents and your health **status**, your marital status is information that the employer cannot use in making decisions about whether or not to hire an applicant. As such, you as an applicant are not obliged to give this information. You have this right to privacy.

# THE EMPLOYMENT EQUITY ACT AND YOUR RESPONSIBILITIES AS AN APPLICANT

Information about racial classification is necessary from the EEA standpoint to help the employer make hiring decisions that advance the objectives of the Employment Equity Plan. Give this information as a woman because it assists in identifying you as an EE candidate. This also applies to disability status. If the applicant happens to be disabled, then information about disability status also helps the chairperson of the selection committee to make the necessary arrangements to accommodate such candidates if they are invited for interviews.

# THE LABOUR RELATIONS ACT AND YOUR RIGHTS AS AN APPLICANT FOR EMPLOYMENT

All candidates must be treated as employees and you therefore need to be subjected to the same treatment as everybody else. Furthermore, the employer has no right to contact referees that you as an applicant have not indicated. Should a need arise for the employer to seek references elsewhere, this needs to be agreed to by the applicant. In exercising this right, bear in mind that your refusal to have directly work-related referees consulted is an indication that you have something to hide. Use your own judgment in exercising this right.

#### **IDENTIFICATION**

The goal of your CV is to convince the selection committee to contact you. Your Personal



employee number is important because it communicates that you are already with the DoE and it allows the panel to check whatever additional information they may need to make a decision. Give your name, gender, Personal number, national identity number, current position and employer.

#### YOUR PERSONAL CONTACT DETAILS

Your CV must clearly reflect both your postal and residential addresses. Whenever possible include telephone numbers: day time, after hours and cell phone number. If you have access to a telefax and e-mail address, include these in your CV.

You must make it as easy as possible for the chairperson of the selection committee to contact you.

#### QUALIFICATIONS

This information is crucial in making the panel decide that you should be invited for the interview. State your formal qualifications as well as other professional development initiatives that you have embarked on. Be specific in doing so. State all the formal qualifications you hold, starting with your highest school qualification and including all the post-school qualifications you hold, indicating the year obtained as well as the awarding institution.

#### **EXAMPLE**

QUALIFICATION	INSTITUTION	DATE
Matriculation Exemption	Isibonelo High School	1977
Senior Secondary Teacher's Diploma	University of Zululand	1982
Bachelor of Pedagogics	University of Zululand	1983
Diploma in Remedial Education	University of South Africa	1990

In addition to my formal qualification I have also attended the following professional development courses and conferences, workshops and seminars:

- Addressing Gender-based violence in South African schools.
- Train the trainer in counselling before and after HIV- testing.
- Appointing Principals: What to look for and How to find it.

#### **EXERCISE**

Using your CV, determine whether you have included all the necessary information, and amend it according to the framework.

Did you include every bit of pertinent information to help the selection committee decide on your suitability as a candidate and also be able to contact you?

#### IDENTIFYING LEADERSHIP ROLES YOU HAVE PLAYED

Leadership occurs in all spheres of life and is not confined to the workplace. Too often women unconsciously downplay what they can do by only focusing on their work experience which often is limited because of the history of the RSA. Leadership roles are typically those roles for which incumbents are elected or appointed because of the leadership qualities they have. Include in your CV all leadership roles you have played in the community, in church organisations and in social clubs. If you are relatively inexperienced (started working recently, less than 3 years' work experience) you can include college and school-related leadership roles. Leadership roles include the following:

#### **LEADERSHIP ROLES**

Board Member	Representative
Chairperson	Secretary
Convener	Treasurer
Captain	President
Scout master	Vice President
Choir master/mistress	Sports master/mistress
Regional representative	

#### **DECIDING ON A CV FORMAT**

The two most popular CV formats are the chronological format as well as the functional format. The chronological sequence focuses on the sequence of one's work experiences and the functional format focuses on the outputs of various positions held.

Chronological sequence from most recent to earliest positions held during your career This format is ideal if your:

- Latest job(s) link(s) directly with the position you are applying for.
- CV does not have any gaps and it is relatively extensive.

# CHRONOLOGICAL SEQUENCE STARTING FROM EARLIEST TO MOST RECENT POSITIONS HELD

This format is ideal if:

- · Your work history has some gaps, and
- The position you are aspiring for relates more to positions you held in the distant past.

#### THE FUNCTIONAL APPROACH

The functional approach groups one's experiences in terms of the key job outputs of previous positions held. This approach is most helpful in highlighting that you, the applicant, have had an opportunity to perform similar functions elsewhere.

#### **EXERCISE**

What format have you used in your CV? Is it a chronological format or functional?

If chronological, what sequence have you followed? Does it start with the most recent positions held or with the earliest positions you have held?

Why have you chosen this format?

Is it an ill-defined mixture of both?

Decide on the most appropriate format and amend your CV accordingly.

#### CAREFULLY CHOOSING YOUR WORDS IN YOUR CV

A CV consists of words, and every word must count. If it does not add value to your CV, that word must not be there. Your CV must:

- Reflect your personality and interests.
- Describe specific key competencies that you have earned via formal education, work experience and extra-curricular activities.

Words used must connote expertise and achievement, and words that help you achieve this are action words.

#### **EXAMPLES OF ACTION WORDS (verbs)**

Developed	Increased	Chaired	Solved
Administered	Influenced	Revamped	Started
Conducted	Evaluated	Performed	Supported
Controlled	Monitored	Initiated	Counselled
Created	Taught	Revised	Organised
Directed	Implemented	Scheduled	Coordinated
Eliminated	Maintained	Supervised	Originated
Established	Managed	Mentored	Planned
Led	Motivated	Guided	Attended
Expanded	Coached	Examined	
Generated	Proposed	Moderated	

#### **WORDS TO AVOID**

Stay away from the following words, as they add no value to your CV:

"I" - this is your CV and you are obviously talking about yourself;

"We," as this communicates a lack of direct involvement and responsibility;

Avoid flowery language and clichés such as "brilliant", "excellent", "strategised" and "orchestrated". These words indicate oversell and a sense of desperation.

It is easier to avoid using superfluous words by starting your sentences with the action verbs given above.



#### SELF MANAGEMENT

#### **WORK EXPERIENCE**

The section on work experience tells more about the individual that one often realises. It says something about the individual's values, habits, interests, personality and ability to relate to others. This is as important to experienced managers as it is to any woman seeking to enter the world of work.

There are many different types of work: full-time work; part-time work, internship, volunteer work, cooperative education. The guiding principle in terms of what to include is its **relevance** to the position you are applying for. Make sure that your CV highlights information that is not covered as part of the standard application form that you have to complete.

It is possible that the question could arise as to what approach to adopt if your work experience is too extensive. If you have extensive work experience of 15 years and above, highlight perhaps what you have done in the past 10 years and mention the rest of your full-time employment history. You still present your entire work history but **you draw the attention** of the selection panel to **aspects** of your work history that are **most pertinent** to the position you are applying for.

In deciding whether to include volunteer work and part-time work, once again consider its relevance. Ensure that the information you give is **factually accurate**. **Falsifying one's CV is** sufficient grounds for dismissal if discovered.

#### **SEQUENCING**

All full-time work must be listed, otherwise, it creates an impression that you have something to hide. If there are gaps in your CV indicate the reasons.

#### What to include in the work history section:

- Type of work: Teaching/ management of a farm school.
- Job title: Principal and teacher.
- **Job content:** This is a description of outputs each individual job you have held. Action verbs are useful in communicating job content. This should cover all aspects of the job, including items such as "controlled a budget of R xxxx xxxx".
- Management: Managed staff complement of X.

Managed learning and teaching activities for grades 1-4.

Managed a high school with dormitory facilities.

Overall responsibility for scheduling of learning and teaching activities.

Liaised with the district office.

Coordinated training activities of staff.

• **Teaching:** Taught mathematics to grades 1-4. Taught Setswana to grades 2-3.

Served as a substitute teacher for environmental studies for 7 months.

Include subjects taught and pass rates if that enhances your standing (if the examination was external)





• **Relationship management:** Served as an interpreter in meetings between the community and the farmer.

 $\label{lem:mediated} \mbox{Mediated disputes between the parents and the farmer.}$ 

Facilitated meetings between DoE officials and the farmer.

Overall management of relations with the parents.

The idea is to structure your CV in a manner that captures both the job content and responsibility level: This is important in order to indicate to the panel that you have the required skills/attributes. Go for this detailed breakdown for every position you have held:

- **Training received**: In your current/previous job, is there any type of on-the-job training you received, e.g. computer training?
- Contributions to the profession: Served as a regional/district/provincial representative in task team X; Member of the reference group for Materials Development for Women in and into Management Positions; Visited the UK as part of a team that was investigating Y.
- Extra-curricular activities: Led the senior secondary choir to regional victory for two years running (1999 and 2000). The choir reached National finals. Coached soccer/tennis/ netball etc. Include number of significant victories.
- **Initiative:** List things you started in your school/district/provincial office, e.g. initiated a scout pack; initiated a careers day; a gospel music group; a choir; teaching of commercial subjects, a support group for abused learners; collection of donated clothing from local factories for needy children, etc.
- Publications and conference presentations: Wrote an article in a professional journal Y dated, title of the article: The Teacher (Jan 2000): 'Why learners need to be empowered to make their own career-decisions'. Presented a paper in the 45th Congress of Natal Teachers Union. What is people's education? held at Madadeni College of Education, Newcastle 23-27 October 1989.



#### **REVISIT YOUR CV**

Have you described the content of each job you held in a manner that also captures your level of responsibility?

Have you covered all aspects of the job content for every position you held?

Have you cited the relevant numbers, i.e. size of school: staff complement

Have you covered your participation/involvement in extra-curricular activities?

Have you included your conference presentations or contributions to professional publications?

Have you included your liaison function with DoE/community, etc?

Have you included your participation in extra-curricular activities?

Any other pertinent par-time work that you have done?

#### REFERENCES

Your CV is incomplete without a list of contactable referees. It is important that your referees be contactable via phone or telefax as the selection decisions require access to relevant information within time constraints. It is your responsibility as a job applicant to:

- · Check if the people you put down as your referees are willing to serve as referees.
- Are available and contactable at the time.
- Use your judgment to make sure that the names of people you give as your referees are less likely to let you down.
- Include at least three just in case one is not available.

Current contact numbers via phone, fax, cellphone or email are important. **Having a non-contactable referee is as good as not having one**.

#### WHO SHOULD BE YOUR REFEREE?

Ideally referees should be people with whom you have worked and who therefore know you in your capacity as a professional. It is even better if it is someone who has been your supervisor, whether in your previous job or current job. Your credibility as a professional is not enhanced if your referee does not belong to the profession and therefore obviously does not know you in a professional capacity.

TIPS		
You can generate your CV by using a format of your choice.	You may be required to use the format prescribed by your provincial department.	Regardless of what type you use, give the process of writing your CV the serious attention it deserves by first generating it before transcribing it onto the prescribed format. Never hurry and never submit a CV that you have not slept over.



#### THE MYTH OF ONE CV

Instances arise where women develop one CV and try to use it to apply for whatever position is available. While it is immoral and unethical and even criminal to falsify one's CV, the "one-size fits all" does not work in job hunting. The implication is that you should customise your CV to fit the job you are applying for. Lay it out so that it highlights skills and attributes sought. If the job requires subject content expertise, for example, then highlight an aspect such as subject advisor. If the job requires leadership and managerial competencies, then structure your CV to highlight aspects that approximate this requirement. Remember the purpose of the CV is to capture attention and win you an interview.

A bland, generic and non-specific CV is certainly not going to help you reach the objective of being invited for an interview!

#### COMPLETION OF THE RELEVANT APPLICATION FORM

The Department of Education at both National and Provincial level as well as other government departments require that job applicants complete relevant application forms for the positions they apply for. This requirement implies that:

- All CVs need to be accompanied by application forms.
- · Application forms must be completed properly and in full.
- Failure to comply with these requirements leads to summary rejection at the sifting stage.

As an applicant, it is your responsibility to ensure full compliance with this requirement, otherwise you eliminate yourself from the race before it starts. No exceptions are made in this regard. It does not matter what your gender is.

- Make sure that the form you complete is appropriate. For example, you should not complete an Application for a Promotional Post instead of an Advertised Post form.
- Make sure the form is completed in full.

#### **TIPS**

- Take CV writing seriously.
- Restructure your CV to highlight what is needed.
- Never falsify information in your CV, it is only a matter of time before it catches up with you.
- · The layout of your CV should be professional.
- · Eliminate spelling errors in your CV.
- Strive for correct grammatical expression



### **UNIT 11:**

#### WRITING A COVERING LETTER

#### **OUTCOMES**

- Know the importance of a covering letter.
- Know how to write an effective covering letter.
- Put the skill of writing a covering letter into practice.

#### WHAT IS A COVERING LETTER?

A covering letter is a personalised form of correspondence that serves to introduce the job applicant to the individual sifting the applications, and later to the selection panel. It should shout: "Look no further; I am the best candidate for the job; see for yourself by inviting me to the interview!"

#### PURPOSE OF A COVERING LETTER

A covering letter serves as an introductory sales letter. You are selling your skills and not your soul! It should motivate the potential employer to read the attached CV and should show how you are amongst the best applicants for the job.

- A covering letter also demonstrates some attributes that would be difficult to detect from a CV. Personal touch, writing style, maturity, poise, finesse and command of the official language - English - are good examples of this.
- It talks to the specific position you are applying for and therefore suggests that you know what you are looking for.
- It creates a professional image that forces the recipient to take you seriously.
- In cases of several positions being advertised concurrently, it channels your application to the right office for processing.

### TIPS ON HOW TO GENERATE AN EFFECTIVE COVERING LETTER

#### PERSONALISE THE COVERING LETTER

- A covering letter should always be individually typed and personally signed by the job seeker.
- Establish who will be handling applications for the position you are applying for and address it to that individual. This information is usually given in the advertisement.
- Address your letter directly to that individual instead of the bland Dear Sir/ Madam.

#### YOUR COVERING LETTER SHOULD COMMUNICATE PURPOSE

Briefly indicate why you find the advertisement attractive, focusing on your interest-doing the job from the perspectives of growth, career enrichment, making a contribution, etc. Never mention the prospect of a higher salary in your covering letter.

#### BE CONCISE

Say what needs to be said concisely and to the point, and do not cover anything in your covering letter that is already covered in your CV. Otherwise it becomes unnecessary duplication which wastes time.





#### CAREER OBJECTIVE

This indicates that you know where you want to go and that you are working hard to get there. Before you state your career objective, determine how it might be construed. In relatively conservative settings the expression of your career objective can be perceived as an urge on your part to topple the current incumbents. Use your judgment in deciding whether to include or exclude.

Stating your career objectives communicates that you are serious about your career and you are approaching it in a planned fashion.

#### **EXAMPLES OF CAREER OBJECTIVES**

- · Wish to advance in my career by getting a position in educational management at a middle management level where I will use my experience and gain exposure to educational management at a circuit, district or provincial level.
- · Having worked in the field of education at district level, I wish to broaden my exposure by getting involved in educational management at a regional level.
- I have extensive experience as a principal, as well as a district official, and I would like to extend myself to the area of special education at provincial level.

#### GRAMMATICAL CORRECTNESS AND ACCURACY

You cannot afford to display a disregard of grammatical rules at this early stage. Your covering letter must be perfect and to the point. This is even more so if the job you are aspiring for requires a lot of writing.

#### SAMPLE COVERING LETTER

2 Boabab CrescentKimberley 970027 February 2002

The Chairperson
School Governing Body
Star of the Sea High School
Private Bag X451
UPINGTON
3066

Dear Madam/ Sir ("Mrs Ndo" if required to address a specific person)

APPLICATION FOR PRINCIPALSHIP, REF NO: 1234

Your advertisement appearing in the Business Times of February 11 2002 and advertising the above post has reference. (Introduction) I would like to apply for the position in the belief that I meet all the requirements as set out in the advertisement. I am in possession of the required academic qualification and have the necessary practical experience. (Purpose of the letter)

I obtained a Bachelor's degree in Educational Management from the University of the Witwatersrand in 1984 and am currently reading for my Master's degree in the same field. In the interim I have attended three management courses offered by the provincial department, as you will notice from my CV. (Qualifications) I have thirteen years experience in the field of education, having served as subject teacher and Head of Department.

On two occasions I acted as principal for extended periods, 9 months in 1999 and 7 months in 2001 respectively. During this time I was successful in maintaining a high learner and educator morale. These were difficult times for our school from the perspective of ... (**Provoke the reader by highlighting achievements**)

My long-term career objective is to contribute to the advancement of education in this province by working at the district level. This position is a step in the right direction in preparing me. (Career objective) I am task oriented and an effective team player. I believe in achieving results and making sure that I collaborate with my team. I endeavour at all times to lead by example. (Motivation: personality)

A copy of my Curriculum Vitae as well as relevant application form are attached.

I look forward to hearing from you soon. (Positive outlook regarding Interview) Yours faithfully,

(Signature)

Jeanette Kemp



### SECTION C: NOW THAT YOU HAVE SECURED AN INTERVIEW, WHAT NEXT?

Sometimes women put all their effort into securing a job interview, only to respond to the good news of having been invited for an interview with nervousness. Such a reaction is understandable but quite contrary to logic.

### **UNIT 11:**

#### PREPARATION FOR THE INTERVIEW

#### **OUTCOMES**

- Equip women with the skills they need to prepare for an interview.
- Instill confidence in women to perform well in interviews.
- Ensure that women exercise their rights as interviewees.

#### WHAT IS THE PURPOSE OF A JOB INTERVIEW?

A job interview is an exploratory discussion between the job applicant and the employer as represented by a selection committee to ascertain the degree of match or congruence between the candidates and the job by:

- Relating the skills and competencies of candidates to job outputs.
- Discerning the personal attributes and temperament in terms of the context or organisational culture.

Because what is sought is the extent to which the candidate meets the requirements of the job, the entire session should focus on job-related matters.

#### **EXERCISE**

BASED ON THE PURPOSE OF A JOB INTERVIEW STATED ABOVE, UNDER WHAT CIRCUMSTANCES WOULD IT BE LEGITIMATE TO RAISE THE FOLLOWING ISSUES IN AN INTERVIEW, OR SHOULD THE FOLLOWING ISSUES NOT BE RAISED AT ALL?

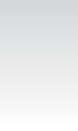
Your ability to handle male subordinates

Your ability to travel.

The number of dependents you have.

Your ill health

The distance between where you live and your office





#### WHAT DO YOU NEED TO DO TO MAKE YOUR INTERVIEW A POSITIVE EXPE-RIENCE?

A job interview is a positive experience if:

- Your expectations about what the interview is about are met.
- You are able to make a favourable impression.
- Your professional standing is enhanced rather than diminished by the experience.

In order for the job interview to be a positive experience regardless of whether you get the job or not, you must be thoroughly prepared for it.

#### **BEFORE THE INTERVIEW**

You have just received notification that you have been invited for an interview for the position you applied for. You have been looking forward to this opportunity. The interviews will be held on Friday next week. What would you do to make sure you are ready (prepared) and willing (psychologically ready) to do your best in the interview?

#### KNOW THE JOB CONTENT

Make sure you know enough about the job content, i.e. the demands, the job content. Find out what the job is exactly about beyond the title. This will help you prepare for questions like: "Why do you think you are the best candidate for the job?" If you cannot answer this question with conviction, you cannot possibly convince the panel that you are the right candidate for the position.



#### **RESEARCH THE JOB CONTENT BY:**

- Reading pertinent documents.
- Inquiring from people who hold similar jobs elsewhere.
- Inquiring from other relevant officials, making sure that you do not appear to be seeking to be unfairly advantaged.
- Your questions should relate to the job content, what the job is about, rather than possible interview questions.

#### GET ALL THE INFORMATION ABOUT INTERVIEW LOGISTICS

After being informed about the venue, the date and time, establish where exactly the venue is and how to get there beforehand if the venue is not a place you are familiar with. Do you need to make any arrangements, e.g. to access the building, parking etc, and budget your time to accommodate these finer details.

#### PREPARE PSYCHOLOGICALLY

Most interview panels are dominated by men, and honestly ask yourself whether you have an issue with this? Does that make you nervous or overly anxious to prove your worth? Either modes are detrimental to optimal performance. A minimal degree of anxiety is to be



expected and this in fact has been found to enhance performance because total absence of anxiety often leads to complacence.

#### **CONQUERING YOUR FEARS**

You can work at your fear and anxiety by practising beforehand. Ask some of your colleagues to offer you a trial run of the interview and involve particularly those whose professional opinions you respect. Ask them to be quite stringent in their approach so that you can begin to anticipate the worst case scenario.

#### ADOPTING POSITIVE SELF-TALK

This strategy involves adopting a positive inner dialogue that you run through your mind whenever you get anxious. Repeated it over and over again until you come to believe in the positive statements and then you begin to act in a manner that confirms the positive statements. This is the self-fulfilling prophecy in action:

- "I am adequately qualified for this position."
- "If others can do this, I can do it too."
- "The panel is composed of people just like me, they are not perfect so they cannot expect me to be perfect."
- "I am as good as everybody else."
- "Whatever I do not know about this job I can learn."
- "I will get in there and do my best."
- "Any interview is an opportunity to learn regardless of the outcome."
- "If I was not good enough, I would not have been short-listed."
- "I do not care about other candidates. All I can do is to do my best."
- "I should not even bother to find out who else applied, that is not my business."

#### PREPARING YOUR QUESTIONS TO ASK THE PANEL

In keeping with the spirit of participation, selection panels often give candidates the opportunity to ask questions. It helps to prepare questions that relate to the job content. Asking questions related to remuneration and benefits in the interview creates an impression that your primary interest in the job is money. Rather ask about what the job entails.

- "In addition to the job aspects that have been alluded to, are there other aspects/dimensions that I should be aware of?"
- "What type of training is provided to help new-comers at this level to perform up to speed?"
- "For this particular position will the job incumbent be expected to sign a performance contract?"
- "How much travelling will be required on a monthly basis?"
- "How much notice can one expect to get prior to travelling?"
- "How soon will the outcome of the interviews be communicated, and how?"

Remember the purpose of these questions is to get pertinent information.

Avoid interviewing the panel by asking too many questions. Be selective and pertinent.



#### ON THE DAY OF THE INTERVIEW

#### **BE PRESENTABLE**

Dress for success, meaning that you should strive to look professional in terms of both dress and grooming. Unfortunately we still live in the world where first impressions tend to be lasting impressions. This does not mean you must be over-dressed, i.e. go overboard. The golden rule is: if you know the general culture of the panel, blend with your panel. Extreme either way can create a negative impression. Definitely show less flesh lest you create an impression that it is your body and not your brains that are on offer! Carrying a file containing all the relevant documentation in an organised fashion enhances this professional image.

#### ARRIVE ON TIME

Make whatever prior arrangements are necessary to make sure you arrive on time. Late-coming for interviews has a domino effect i.e. it affects not only you but all candidates that come after you. It can also be downright irritating to the panel, and it communicates that you have no respect for other people's time. Late-coming is definitely unprofessional and the question is if you come late for an interview, will you bother to come early for work? If you, as part of preparing, know where you are going and how to get there, you enhance your chances of arriving on time. Plan on arriving at least fifteen minutes before the scheduled time. This allows you time to settle in and be cool and collected by the time you are ushered into the interview room.

#### WHAT IF YOU RUN LATE DESPITE PLANNING?

Even with proper planning, sometimes forces beyond your control can make you arrive late for interviews, e.g. road closed, public transportation not running on schedule, traffic delayed by an accident, etc. At the point where you become aware of the possibility of running late, inform the secretary/ admin clerk immediately. This information is vital for allowing the panel the opportunity to decide how to proceed. When you do arrive, apologise for running late and state the reason briefly without belabouring the point. Do not make excuses least of all, excuses that relate to your responsibilities as a woman.

#### WHEN YOU ENTER THE ROOM

As a candidate, the chairperson/usher should introduce you to the selection committee and introduce the selection committee to you. The introduction phase allows for the breaking of ice and is also a courtesy. Should the chairperson not carry out this responsibility you are left with no choice but to introduce yourself. Read the panel as to whether handshakes with each one of them is feasible, given the seating arrangement.

#### WAIT TO BE SEATED

Even though it is quite obvious which chair to occupy because all other chairs are taken, wait to be told by the chairperson that you can take a seat.

#### PAY ATTENTION AND MAINTAIN EYE CONTACT

Attentiveness will help you understand the questions and context and facilitate your coming up with relevant answers. Avoid staring at the members of the panel while maintaining eye contact, especially with individual panel members as they speak.

#### BE MINDFUL OF YOUR LANGUAGE AND BODY LANGUAGE

Avoid slang and stick to formal English while you project yourself in a manner that exudes self-respect, self-confidence and respect for others, and be polite all the way through. Project a body language that shows enthusiasm, interest and confidence while avoiding appearing like an actor. In cases where you do not understand the question, politely ask the interviewer to repeat/rephrase the question. Used carefully, this strategy can also help buy you time to think through the answers. However do not overdo it! Avoid socially unacceptable habits, e.g. nose picking and making irritating noises like flicking a pen, hand rubbing, nail biting, etc.

#### BE TRUTHFUL IN YOUR ANSWERS

If asked about something that you have never done but you know how to do, be truthful about what you have done, you know how to do but have never done, and those things that you do not know. Your honesty and integrity are important variables being indirectly measured! Lies always catch up with you.

#### AFTER THE CHAIRPERSON'S CLOSING REMARK

Thank the panel for the time they invested in interviewing you and express the hope to hear about the outcomes of the interviews as soon as possible. Leave the room, making sure that you take all your personal belongings with you. It shows you are comfortable and organised.

#### **EXERCISE**

ROLE-PLAY			
Constitute a selection panel of no more than 6 members. Using a real position that existed in the recent past.	Have the panel decide on roles and responsibilities. Role-play an interview with about three of the participants as candidates.	The rest of the participants observe the interviews and at the end of each interview give constructive feedback to the panel and the candidates	



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



### PREFACE: SELF-MANAGEMENT

Women in and into management positions continue to experience severe constraints in terms of using their time effectively. This is mainly brought about by the fact that women do not cease to take responsibility for household responsibilities when they get promoted to senior positions. Furthermore, the woman's natural inclination to listen, nurture and care, can, if unchecked, constitute an obstacle that prevents her from utilising her time effectively. This necessitates that women view time as a precious commodity which they utilise to meet the responsibilities for their jobs while making sure that they do not neglect other aspects of their lives, e.g. motherhood, participation in extramural activities, as well as setting aside time for themselves. It is necessary for women managers and aspiring women managers to lead a balanced lifestyle.

Women managers should realise that being excellent in one area of life while neglecting other areas is not an option. This module seeks to empower women managers and aspiring managers to manage themselves effectively, as it is only when they can manage themselves and their affairs effectively, that they can succeed in managing others.

The module is structured in a way that challenges participants to do a great deal of introspection. Introspection is important because unless women understand themselves well enough to know what it is in their own being that holds them back, they cannot change. The module is loaded with practical activities that allow women to explore those issues about themselves that make them productive or unproductive. As such, sharing of participants' perspectives is allowed only on a voluntary basis.

The module starts with the abstract psychological exploration of the self and related concepts, and it ends with practical strategies to use time effectively and economically.

The module can be effectively used both in a group session as well as in an individual self-development process. The need for women to manage themselves effectively can never be overemphasised if they are to continue realising their latent potential, while also doing a good job as parents, spouses, daughters and community leaders.





# **EXPLANATORY NOTES:**

<u></u>	=	FACILITATOR'S INPUT/NOTES	-	This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.
	=	HINTS	-	This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.
•	=	ROLE-PLAY	_	This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who participated actively in the exercise.
	=	EXERCISE	_	This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.
	=	CASE STUDY	-	This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.
V	=	SELF-TEST	_	This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in

the contents of the unit/module.

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### INTRODUCTION

Greater gender equality between men and women in the workplace has resulted in increasing access by women to positions of power and authority. In this regard, a need has arisen for women to manage their careers and indeed themselves more effectively. In households, women continue to bear the overwhelming responsibility for rearing the children irrespective of whether they work in the home or are employed outside of the home. Domestic issues continue to compete with management responsibilities for women occupying more senior and management positions. This is often cited as a cause of women managers being prone to stress-related conditions. In this light, it is imperative that women learn to create a balance between the responsibilities of their career and those of their personal lives. Good management begins with managing oneself effectively. Then one can begin to look at managing others effectively.

This module focuses on self-management by women. It aims to assist women to effectively execute their professional duties without neglecting their personal or domestic responsibilities.

### THE BROAD AIMS OF THE MODULE

- Help women to understand themselves better, i.e. who they are, how they behave, act and react.
- Determine how 'who they are' as a women affects their ability to function effectively at work.
- Identify the areas in which women need personal development in order to improve their effectiveness
- Assist women managers to lead productive balanced lifestyles.

### **ASSUMPTIONS**

Historically society has defined women in terms of their relationship to others: 'daughter', 'wife', 'mother' in relation to their father, husband or children respectively. This prompts women to develop a sense of identity linked to others. Women are now beginning to define themselves in terms of who they are as individuals. Women too have their own individual strengths and weaknesses. To achieve success in executing managerial functions, women need to know who they are.

Women are not responsible for everything that may happen to them, but always have the power to decide how to react to any given situation. Unless women, as individuals, feel good about themselves and project that to the world, it is unlikely that others will see them as worthy human beings let alone managers. To be taken seriously, women need to begin by taking themselves seriously.



# **UNIT 1:**

# UNDERSTANDING ONE'S OWN IDENTITY AND SELF-CONCEPT

In a sense, every situation we encounter is biased. We always carry with us our own beliefs about ourselves and the world around us. How we see ourselves and from time-to-time what we deliberately project about ourselves influence the way in which we are seen by others. Such is the complex nature of human behaviour.

### **OUTCOMES**

At the end of the unit the participant will:

- Acquire an enhanced understanding of self-identity, self-concept, self-esteem and self-image.
- Acquire an understanding of the influence these attributes have on one's own behaviour and actions.
- Identify areas of the self that she needs to develop.

### **EXERCISE**

BEFORE GOING ANY FURTHER, ANSWER THE FOLLOWING QUESTIONS BY WRITING DOWN THE FIRST THOUGHT THAT COMES TO MIND WITHOUT DELIBERATING ON THE QUESTION:
Who are you?
What image do you strive to project?
How do you feel about yourself?
What do others think of you?

### **DEFINITIONS**

A dynamic combination of our own perceptions about ourselves, self-identity, self-concept, self-esteem and self-image, strongly influence our behaviour and actions in interacting with others and the reality around us. Chaplin (1985) defines these as follows:

- 'The self' the individual as a conscious being representing a dynamic combination of thinking, feelings, emotions and volition.
- 'Self-identity' the sense of who you are focusing on those elements that are relatively stable. It is a definition of who you are based on experiences you have had. For example 'I am a hard-working, intelligent woman of integrity' is a definition of the self, independent of others. You are you and not someone's mother, wife or daughter.
- 'Self-concept' represents the individual's appraisal or evaluation by themselves. Selfconcept can be positive if it is largely based on successes. It can also be negative if based on failures. It is correct if based on objective successes or failures and incorrect if based on imagined rather than real successes or failures.
- 'Self-esteem' refers to whether one feels worthy or unworthy as a person.
- 'Self-image' is the picture of the self that the individual chooses to portray or project. This picture may be very different from the real self, and varies from situation to situation.

The self is ever evolving and although you are largely influenced by your past experiences you have the power to control the present and influence the future.

HOW YOU THINK AND FEEL ABOUT YOURSELF LARGELY DETERMINES HOW YOU PROJECT YOURSELF. THAT INFLUENCES HOW OTHERS THINK AND FEEL ABOUT YOU AND HOW THEY ACT AND REACT TO YOU.

READ EACH STATEMENT AND DECIDE WHETHER IT REFERS TO AN ISSUE OF SELF-IDENTITY (SID), SELF-IMAGE (SIM), SELF-ESTEEM (SES) OR SELF-CONCEPT (SC).

- Based on my previous track record I know I can do this.
- I do not have much of a choice, I just have to keep quiet because he is too powerful to be confronted.
- Well, I would not even bring that up, who am I after all.
- 4. I am not exactly sure of whether they like me or not.
- 5. I want them to think that I can afford to buy that luxury car.
- 6. I always dress up like a professional woman.
- I feel very lonely although I create an impression of being close to other people, including my spouse.
- I am reasonably comfortable about how I feel about my accomplishment.
- I believe I am good at managing people.
- 10. I am the boss. They cannot oppose me. I will not even give them a chance to speak on this matter.



# UNIT 2:

## THE QUESTION OF SELF-IDENTITY, 'WHO AM I?'

### **OUTCOMES**

At the end of the unit participants will be better able to:

- Know who they are and what they stand for.
- Identify beliefs that they hold about themselves that are counter-productive.
- Modify those beliefs that are counter-productive.

### AN EXAMPLE OF IDENTITY ISSUES FACING WOMEN

The "Who am I?" question for women is often more complex than for men. Society generally defines women in terms of their relationship with others. You are first your father's daughter and later your husband's wife. In this context, little opportunity exists for women to define themselves, unless they make a conscious effort to do so. Men keep the same identity regardless of whether they are single, married, divorced, bereaved or remarried. The challenge for women is to define themselves based on their own individual merits and talents without reference to others.

### **SELF-AFFIRMATION**

"I am not merely an extension of my family and I am not the shadow of my spouse. I am an individual in my own right with the power to define myself."

### A SOUND SENSE OF IDENTITY IS ABOUT SELF-ACCEPTANCE

Crucial to answering a question about who you are is the issue of acknowledging that nobody is perfect. We all have strengths and weaknesses. Some of the weaknesses we have can be overcome through effort and training. Other weaknesses that we have are so much part of who we are that they are difficult to overcome .The trick is to distinguish between what you can change, and what you cannot change and integrate both strengths and weaknesses in defining who we are.

### **IDENTIFYING PERSONAL STRENGTHS**

Personal strengths are those attributes that you, as an individual, have and that makes it easy for you to do certain things. If you are persuasive, it is easier for you to sell your ideas to others. If you are internally directed or 'introverted' it may be easy for you to deal with criticism because you essentially do not depend on external praise to retain your sense of worth. Bear in mind that a strength in one context can be a weakness in another. For instance, the capacity for hard work is a virtue or strength except if a hard working manager expects everybody else to meet his/her superior standard.



### **EXAMPLE**

In the space provided below list your personal strengths. These are qualities that you were mainly born with. Do not include your educational qualifications and experience as these are acquired.

MY PERSONAL STRENGTHS	

### **IDENTIFYING YOUR PERSONAL WEAKNESSES**

Personal weaknesses are those attributes that make it difficult or impossible to get certain things done. Being indecisive for a manager would be an example. Should a manager consult over and over to determine the best course of action and in the process become more uncertain about what to do, she would be ineffective in her role and fail in her responsibilities. Another example is forgetfulness. This can often be overcome by using cues or hints that serve as reminders. In the space provided below list personal weaknesses that you bring to the job and consider ways in which they can be overcome.

WEAKNESS	PERCEIVED ABILITY TO OVERCOME

It is important that women managers be honest about what they can and cannot do. It serves no purpose to attempt being a superwoman who knows and can do everything. Some weaknesses can be addressed by training, especially when such weakness is related to a lack of exposure or knowledge. Other weaknesses, especially those linked to one's personality, can be very difficult to change because during times of pressure people generally act and react in a manner that comes naturally. What women managers need to do for the weaknesses that they cannot overcome, is to find ways of working around such weaknesses.





### **EXAMPLE**

### WEAKNESS - In-attentiveness to detail:

I tend to concentrate on the bigger picture and lose sight of details. This means that in developing an elaborate document, the concept will be sound and the flow of ideas logical. But when it comes to spelling, grammatical correctness and lay out, the document ends up being a mess.

### **SOLUTION:**

Make sure that I get someone to proofread my documents especially the lengthy ones generated under serious time constraints. Adopt a motto: "Edit before sending out."

### WHAT ARE YOU GOING TO DO ABOUT YOUR WEAKNESSES?

Identify your weakness Indicate what you can do to minimise its impact on your job

IDENTIFY YOUR WEAKNESS	INDICATE WHAT YOU ARE GOING TO DO TO MINIMISE ITS IMPACT ON YOUR JOB

Develop an action plan to build on your strengths: What are you going to do to make sure that your strengths are exploited to the maximum?

STRENGTH	ACTION TO MAXIMISE STRENGTH

# **UNIT 3:**

### SELF-CONCEPT AND WOMEN IN MANAGEMENT

### **OUTCOMES**

At the end of the unit participants should be able to:

- Understand the relationship between self-concept and productivity.
- Understand the importance of a healthy self-concept.
- Change negative beliefs about the self.
- Apply the knowledge gained in practical exercises.

### **DEFINITIONS**

We have defined self-concept as a set of beliefs that one holds about oneself. The individual's self-concept can be positive if based on positive experiences and constructive outcomes. It can be negative if it is largely based on negative experiences and unconstructive outcomes. To develop a realistically positive self-concept, the individual needs to have experienced a reasonable degree of success.

For example, a soccer striker is said to have a realistically positive self-concept if it is based on relatively many goals scored during a soccer season. If the striker continues to believe that he or she is a good striker in the absence of objective proof, his self-concept may be positive but unrealistic. Following a series of failed attempts at scoring goals, the same soccer player may look at objective reality and begin to wonder whether he is indeed as good as he thought. He may begin to question the worth of his contribution in the absence of goals. This can lead to the realisation that he is not that good after all. This would lead to the development of a negative but realistic self-concept. This soccer player can either find out what it is he does best and opt out of soccer, or exert more effort and find ways of sharpening his skills.

A situation may arise where a soccer player may set unattainable goals for himself. This can lead to a situation where no matter how good he is, he will not be able to attain those goals. By objective standards, the player would be considered a good player, but he would not feel that way about himself because of his failure to reach the unrealistic goals that he set for himself. This would lead to the formation of an unrealistically negative self-concept. General manifestations of different types of self-concept



### GENERAL MANIFESTATIONS OF DIFFERENT TYPES OF SELF-CONCEPT

### **FXFRCISE**

### AS A WOMAN MANAGER DO YOU:

- Understand and consider your personal limitations in doing your work?
- Push yourself beyond reasonable limits?
- Realistically know what you can and cannot do?
- Often get surprised that others think you are smarter than you feel?
- Know off-hand what you can/cannot do?
- Need constant reassurance that you are doing a good job?
- Feel important by associating with important people?

A positive and realistic self-concept – knows one's limitations and uses personal strengths to her advantage. Surrounds herself with a team that complements her weaknesses.

**Positive and unrealistic self-concept** – believes one can conquer the world, lacks insight into what one can and cannot do and this leads to failure to deliver that creates further problems like low self-esteem.

**Negative but realistic** – honesty about what she cannot do but seems to focus exclusively on the negative with the result that she ignores her strengths.

**Negative, unrealistic self-concept** – the problem here is that the individual sets herself up for failure by setting unrealistic goals. Modify the goals in order to build a healthy, positive self-concept.

### EXTERNAL FACTORS AFFECTING THE SELF-CONCEPT OF WOMEN

The formation of a positive or negative self-concept is dependent on a variety of factors. The following are pertinent and tend to influence women as they consolidate their self-concept:

- Societal expectations that require 'adequate' women to be married.
- The success of marriage relationships is seen as the responsibility of a woman.
- Failure of children in one-way or another is seen as a woman's fault.
- The tendency to judge women not on the basis of both successes and failures but the tendency to concentrate on failures.
- The tendency to generalise failures of one woman to all.
- · Parenting is still largely seen as a woman's responsibility.
- Successful relationships with extended family members are a woman's responsibility.
- The success of a husband can enhance or diminish the woman's self-concept.



### INTERNAL FACTORS AFFECTING A WOMAN'S SELF-CONCEPT

Women can be their worst enemies and in the process of trying to fit in they can engage in seriously self-destructive behaviour. For instance, women are more inclined to want to fit in than their male counterparts. This makes women:

- · Seek approval
- · Want to please
- · Want to conform
- Want to maintain what they perceive to be acceptable standards

In the process, women may lose touch with reality and begin to live in a world of illusion. This can be worsened by an increasing tendency to succumb to status symbols in trying to keep up with the Jones's.

The many and varied responsibilities that compete for a woman's attention and the tendency to translate failure in one situation to other areas makes it relatively difficult for women to develop a healthy, positive self-esteem.

### **BUILDING A POSITIVE SELF-CONCEPT**

### DO NOT BE TOO HARD ON YOURSELF

Women can be dissatisfied with just doing their best, but may want to be the best. Under such circumstances, even if the results achieved are good in general, some women may still not be satisfied.

### **SELF-AFFIRMATION**

"I will allow myself to make mistakes because that is how I learn and grow. I will learn from my mistakes. My best is good enough."

### SET YOUR OWN STANDARDS OF SUCCESS AND FAILURE

Success or failure is a matter of opinion in many instances. Different people have different needs and aspirations and people have the freedom to choose from a host of available options on any matter. If you work according to the standards you have set, you can always adjust them when things do not work out, but if you allow others to set your standards, you render yourself completely out of control.

### **SELF-AFFIRMATION**

"This year I will decide what to do, set my own goals and hold myself responsible for achieving those goals. I do not care what others think.



### DO NOT TURN EVERYTHING INTO A COMPULSIVE COMPETITION

Adopt the attitude that in life you win some and lose some. There are good days and bad days. Do not interpret every failure as a personal short-coming.

### **SELF-AFFIRMATION**

"Different people are good at different things. I must focus on what I do best and ask for help in those areas I am not good at."

# CONSIDER PERFORMANCE IN VARYING DEGREES OF SUCCESS RATHER THAN SUCCESS OR FAILURE

### **SELF-AFFIRMATION**

Accept that you are more successful at certain things than at others, and see failures as lesser degrees of success. "I was not as successful as I can be. Next time I will try harder."

### STOP TRYING TO BE A PERFECTIONIST

Not all days are the same and no one is good at everything. Women tend to always want to prove their worth, especially to their male colleagues. In some activities your best is the best, and in other activities your best may not be good enough. Look at your best within the limits of your capabilities and accept that in certain areas other people will do better than you. When you deal with people, your line of business is a chain reaction of many role players. Trying to be a perfectionist is an exercise in futility. Do your best and if your best is still not perfect, be satisfied.

### **SELF-AFFIRMATION**

"I am a human being therefore I am not perfect. I am talented in certain areas and not so good in other areas. My best is good enough given my talents."

### LOOK AT FAILURE AS AN OPPORTUNITY TO LEARN

So you have not been successful, so what was the cause of failure? This post-mortem is valuable in order to prevent future similar failures. Look positively at what you can learn from your failure to avoid similar situations in future.

### **SELF-AFFIRMATION**

"People who succeed overall are those who have the courage to pick up the pieces after falling or failing."



### TALK ABOUT YOUR FEELINGS OF INADEQUACY

You will be surprised about how many people genuinely think you are doing a good job. It is only when you talk about your feelings of inadequacy to close friends and colleagues that they might feel comfortable giving you positive feedback.

### BEWARE OF CROSS-CULTURAL DIFFERENCES IN DEALING WITH SELF-ESTEEM ISSUES

When it comes to dealing with people of other cultures, always be aware that what can be considered in one culture as an indication of positive self esteem may be interpreted by other cultures as displaying a sense of self-importance, and may be perceived negatively as arrogance. For example, African cultures do not encourage self-praise, and some people from such cultures may find it difficult to display positive self esteem although they may necessarily feel good about themselves.

HOW REGULAR DO YOU EXPERIENCE THE FOLLOWING		
Need to be accepted	Feel that own opinions do not matter	
Preoccupied about what others think of you	Anxiety about being second best	
Nervousness about public appearance	Unhappiness	
Set low goals for yourself	Self-conscious	
Feel invisible	Feel you have to conform	
Dare not speak up	Urge to be agreeable	
Feel that your background is not right	Feel unattractive	
Feel not good enough	Afraid to act independently	
Feel unlovable	Feel like being put on the spot	
Mumble when it is your turn to speak	Under pressure to prove your worth	
Others think you do not matter	Others do not hold you in high regard	
Doubt your ideas		

Chances are you suffer from low self-esteem if you experience these feelings regularly.



# UNIT 4:

### **BUILDING A POSITIVE SELF-IMAGE**

Your self-image is your public self and is how you choose to present yourself to others. Our self-image is always the edited version of the real self, i.e. of how we want other people to see us. Hence the adage that a human being can never be fully known. We have many different public images. The image you project at a party is not the same image projected in church on a Sunday morning, which is not the same image projected at work. Living requires reading any situation, deciding which side of you fits the current context and then acting accordingly. In fact, this is quite complex because even in the work environment there will be variations in terms of the image you project with learners, colleagues in the staff room, the SGB and officials from the district office.

When behaviour is not consistent with the situation, that behaviour is considered to be out of line. Women managers need to pay very close attention to this if they are to play the game according to the rules, also considering that because of gender stereotyping, some form of behaviour that can be deemed to be appropriate if exhibited by men, may be considered inappropriate if exhibited by women.

### **OUTCOMES**

At the end of the unit participants should understand:

- the role of self-image in interacting with others
- how they can enhance their professional image factors that build or compromise one's image

### WHY DO PEOPLE ENGAGE IN IMPRESSION MANAGEMENT?

We project different images at different times for purposes of survival. You may nod in a meeting when you actually think what is being said is nonsensical. Success in the work place is about mainly being able to read the situation and acting in a manner that puts you in a favourable light. This is the essence of impression management.

# COMMON MISTAKES MADE BY WOMEN THAT COMPROMISE A PROFESSIONAL IMAGE?

### Too much self-disclosure

Self-disclosure means revealing information that is of a personal nature to others. Home problems, issues with one's spouse, children and other areas of one's personal life fall in this category. Too much self-disclosure to people with whom you are supposed to have a professional relationship can be detrimental to building a professional image, especially because as a manager you then become an object of passage gossip.

TIP: There is nothing wrong with having a confidante, but in selecting one, make sure that your self-disclosure will not be used against you.



### **SELF MANAGEMENT**

### Being overly friendly with staff

Should you want to build a professional image, you must start acting like a professional. Being overly personal and friendly with staff often leads to the blurring of boundaries. For instance, you as a manager cannot afford to engage in cheap gossip with other members of staff unless your intention is to compromise your own professional image. Remember that staff look up to you for leadership and guidance. They have other avenues for social friendships.

**TIP:** In cases where you are personal friends with staff, perhaps in friendships that predate your managerial position, make sure you wear different caps at different times and in formal settings treat everyone the same - i.e. professionally.

### Engaging in socially unacceptable behaviour

The burden on women managers is often far greater than that of their male counterparts. As a woman manager you need to lead by example, both in the community and in the work-place. You therefore have to ensure that you behave in a manner that advances your professional standing at all times, rather than compromises it.

TIP: Your position as a woman manager demands that you behave at all times in a manner that does not put you and the profession in disrepute.

### **Engaging in screaming matches**

If you get too angry, take time out. Do not deal with the issue. Nothing compromises your professional image like screaming at subordinates. It is even worse if it is in front of other subordinates and learners. Words said in the heat of the moment cannot be taken back.

TIP: Always remember that when tempers run high, reason flies out through the window. Keep your cool and if you cannot, take time out.

# STEPS IN BUILDING A FAVOURABLE SELF-IMAGE

Identifying what you need to change

DO YOU FEEL	DO YOU FEEL	DO YOU NEED TO CHANGE
That you lack tact	That you lack tact	
That you speak out of turn	That you speak out of turn	
That you think before you leap	That you think before you leap	
That you lose your temper at the slightest provocation	That you are a time bomb waiting to explode	
That you scream at others when you lose your temper	That you are to be avoided at all cost when you blow your top	
Embarrassed about how you behave	Embarrassed about how you behave	



Having identified behaviours that you need to change, identify concrete steps that you will need to take to change these behaviours.

BEHAVIOUR THAT YOU NEED TO CHANGE	CONCRETE STEPS TO CHANGE IT

### **SOLUTION** USEFUL TIPS IN MODIFYING YOUR BEHAVIOUR

### Knowing what to change and why

Like everything else, you can change your self-image if you:

- Are honest about what you need to change, e.g. How you talk to others, how you dress, how you work.
- Are prepared to invest time and effort to building your new image.
- Are clear about what you want to achieve.

### Modify negative self-talk

Fight that inner voice that keeps repeating negative things about you. Once your self-talk is positive it often sets off a train of positive thoughts that make you feel positive.

### Read situations carefully before you act

The less you speak out of turn and behave inappropriately, the more positive, your self-image. If you just give yourself enough time to reflect before you act, you can improve your professional image. Refrain from reacting to ambiguous situations, and if you are not sure, ask for clarification.

### Resist stereotypes

Avoid behaving in a manner that is consistent with the stereotypes that are accepted as fact for people of your race and gender.

### Resist jumping to conclusions

Not all men colleagues resent women managers. Not all women are jealous of you. The world is not anxiously waiting to see you fall. Judge each situation on its own merits and if you do not understand, ask for explanations in an assertive, yet polite manner.



### Stop playing the victim

It does not matter what others think about you. You are in control of your own behaviour. Not everything happens to you because of your gender. You are an individual who happens to be a woman with managerial responsibilities. Own up to your mistakes and do not use your gender as an excuse. Take responsibility for your own behaviour and actions.

### Project a professional image

Being a person of integrity builds trust in others, makes you perceived as a reliable person. Strive to develop sound professional relationships. Demonstrate objectivity and integrity in dealing with issues. Display impartiality and project an image of competence. Admit to your mistakes and never criticise a superior colleague in public. Demonstrate that others' opinions matter and the fact that you are both a leader and a team player.

### Improve your communication

What you say is as important as how you say it. Do you reasonably know how you come across in oral conversation? Do you know what you sound like if you are upset/ angry/ outraged etc? Do you know what you sound like in your normal speech? If you do not know, you might benefit from recording yourself and playing back the tape. You may be shocked at what you subject your audience to. Identify what needs to be changed and identify concrete action to change the habits that need to be changed.

Spend as much time listening as speaking and make sure that your correspondence achieves its purpose. Keep in mind that direct verbal communication is the most effective way of improving your communication.

### CHECK YOUR INTERPERSONAL SKILLS

Do you invite others to interact with you or are you the kind of person whom colleagues often seek to avoid? Do you speak half-heartedly as if you do not mean what you say? Do you ignore others and appear preoccupied and uninterested most of the time? Do you treat others as if they do not matter? Are you keen to impress superiors and downright rude when dealing with subordinates? If you believe that the worth of people is linked to their positions in life, more than likely you project a very poor professional image to subordinates because you believe they do not matter. If you are to improve your professional image, you will need to do things differently.

### TIPS

- Be the first one to greet and also sound sincere and interested.
- Refer to people by their proper titles. It shows respect and that you are interested.
- Maintain eye contact with the person you are interacting with.
- Use non-verbal language to acknowledge people when you cannot talk to them.
- Always observe the basic rules of politeness and etiquette.
- Deal with people and not their titles.

### What does your work environment say about you?

Is your office desk a chaotic mess that might be projecting a cluttered mind or an empty desk that projects an empty mind? Your work environment says a lot about you. What impression does your table project to visitors? Your table should not necessarily look like

a showroom, but it has to create an impression that you are working on it, that you know what you are doing and that you can access what is there.

### Does your personal appearance and grooming project a professional image?

The whole idea of formal schooling and education means that educators, educational administrators and everybody else involved in education is responsible for impartating values and habits to the learners. Does your personal appearance project values of cleanliness and neatness? Dress in a manner that projects you as a serious professional. The woman manager who wants to be taken seriously cannot afford to be dressed in a manner that projects her as cheap or as drawing attention more to her body than to her brains.

### Pay close attention to your non-verbal language

Pay close attention to your non-verbal language. You as a manager cannot send mixed messages to subordinates. There is absolutely no room for flirting with subordinates. Make sure that you do not send non-verbal messages with sexual overtones. You equally cannot afford to send non-verbal signals that say you are uncertain, undecided, and intimidated. You need to project an image of being in control and confident without being overbearing.

### **CASE STUDIES**

Ms X was recently appointed to head the Special Education Provisioning Directorate in the National Department of Education. She is extremely hardworking and brilliant. She is the youngest Director in the Department and when it comes to dress code she describes herself as a non-conformist, choosing to make all sorts of fashion statements. The male boss has not figured out how to deal with this situation. Instead, he tries to avoid assigning responsibilities to her that will involve external role players.

Identify the problem. What do you think will be the short-term effects of this situation on Ms X's career development? What do you think will be the long-term effects of this situation on Ms X's career development? How would you address this problem if you were the manager?

An unmarried principal is your boss. To be friendly to staff, she freely shares intimate details about her personal life, much to the amusement of her friends and embarrassment of younger male subordinates.

- Do you think this situation is a problem and why?
- How would you discourage her from engaging in such behaviour?
- What do you think will be the long-term effects of the principal's behaviour if left unchecked?



# **UNIT** 5:

### MANAGING YOUR TIME

Dealing with issues of personal identity, self-esteem, self-concept and self-image do not solve all the problems of self-management. It merely clears the way for the woman manager to be able to deal with issues that are more practical in nature. Time-management is one of the important aspects of management that women managers struggle with because of their dual responsibilities as professional and parent. To attend to all responsibilities effectively, women managers need to be methodical in their approach to managing their time.

### **OUTCOMES**

Having completed this unit the women managers should be able to:

- · Set realistic priorities.
- Balance their priorities.
- Delegate certain responsibilities.
- Separate home responsibilities from work responsibilities.
- Use technology to manage time.
- Put an end to procrastination.
- · Use diaries and calendars effectively.

### MANAGING TIME SPENT ON ADMINISTRATIVE TYPE ACTIVITIES

### Organise yourself to save time

One way of wasting time is to adopt a task/duty approach to your work. This approach involves looking at disjointed pieces of work that need to be done without focussing on the broader picture, without exactly knowing how the task contributes to your strategic objectives.



**TIP:** Have a clear picture in your mind of why your position exists. Clarify your role and concentrate on the key aspects of your job and delegate the rest.

### Set goals and link specific actions to broad goals

If you do not know where you are going any route will take you there. After becoming reasonably comfortable with the strategic reason for the existence of your position, set realistic objectives for yourself using the concept of continuous improvement. Realistic goals are characterised by being:

- Specific
- Measurable
- Achievable
- Realistic
- · Time bound

Also know what you need to achieve on a daily, weekly, quarterly basis in order to contribute to the achievement of your overall objectives.





Nothing wastes time more than drifting from one activity to the next aimlessly. Plan your work. Set deadlines and stick to your deadlines. Educate your staff that planning is important and dedicate certain times for guiet work with no interruptions. Working according to plan helps you achieve your objectives.

### Devise a filing system

Avoid spending inordinate amounts of time looking for documents and letters. Being organised will go a long way in saving you time. Organise the rest of your work tools in a manner that allows you to access them with ease.

### Set priorities and stick to them

Few people are able to efficiently handle more than one project at a time. If you are part of the majority, i.e. work best concentrating on one project at a time, finish what you start before you move on. What about home priorities versus work priorities? Organise yourself such that at home you fulfil your home obligations, and while at work concentrate on your work obligations. As a professional woman with managerial responsibilities, it is important to get a support system to help you cope with family matters.

### Dealing with paperwork

Paperwork is one of the key features of most professional jobs, including managerial jobs in the education field. It helps to adopt the DRAFT approach to paperwork (Flanagan and Finger 1998).

- Delegation pile: This is mainly stuff that you route to somewhere else for processing/action.
- Reading pile: This is the stuff that you personally have to read to either keep up with the profession or to comply with legislative and policy developments.
- Action pile: These are items that require a personal response, be it your signature, a response or decision. This can further be prioritised.
- **Filing pile:** Stuff that needs to be filed for future record/use.
- **Toss pile:** This stuff destined for either file 13 or the bin. If you are unsure, file.

### Coping with paperwork

Decide, depending on whether you want to use paperwork as a way of breaking away from other activities e.g. meetings, conceptual work etc. whether you will do it in the morning, midday or afternoon. Whatever you choose, do not let paper work accumulate for weeks.

### Use technology to contain paper-work

Determine whether it is necessary for you to respond in writing and use telephones, e-mails etc. to cope with paper-work. Send SMS messages for instructional, confirmation and acknowledgement types of correspondence where appropriate. Invest in a dictaphone to dictate short memos while driving/travelling to save time. Empower your line administrative assistant to deal with routine correspondence, providing you with draft responses to sign.



WHAT ARE KEY FUNCTIONS IN YOUR JOB	IDENTIFY KEY ACTIVITIES FOR THESE FUNCTIONS

### What are you mainly busy with?

DAILY	WEEKLY	MONTHLY

Are the activities listed above key activities/functions of your job? If not, to whom can you delegate these activities/functions?

# UNIT 6:

### PLANNING FOR PERSONAL SUCCESS

### **OUTCOMES**

Having completed this module, participants should be able to do the following:

- Take practical steps to enhance planning for career success.
- Adopt personal values that enhance career success.
- Craft their own vision.
- Translate personal vision into goals and plan how to achieve them.
- Commit to daily actions that they can use in order to track their personal growth.

### PERSONAL VALUES

A personal value is a conviction that a particular mode of behaviour is personally preferable than its opposite. Our values guide our behaviour. Personal values influence our attitudes and behaviour. They lay the foundation for interpreting the behaviours of others in that we tend to use our own frame of reference to interpret these. Personal values guide our choices. It is what you believe in that will influence the choice.

Some examples would be the belief that an empty mind is the devil's workshop. Such a belief would influence you to work hard even in the absence of external rewards. Similarly, if you believe that loyalty is for the dogs, your behaviour will reflect this and you will abandon your colleagues and allies at the slightest indication of more favourable prospects.

### **VALUES IMPACT ON BEHAVIOUR**

Values that we hold are reflected in our behaviours and action. For instance, a woman manager who values time will exhibit behaviours like coming to functions on time and will tolerate no disruptions of the educational programme.

### **EXERCISE**

Identify your three core values. These are values that you will never compromise or give up, irrespective of the circumstances. Your life is guided by these values. Indicate how these values influence your behaviour and choices in life.

VALUE	IMPACT ON BEHAVIOUR



The following are six area of your life within which you can situate your values. In the list below situate your values in relation to an area of life.

AREA OF LIFE	DESCRIPTION OF AREA	MY PERSONAL VALUES
Finance	<ul><li>Personal budgeting</li><li>Use of credit</li><li>Financial responsibility</li></ul>	
Family	<ul><li>Marriage you want</li><li>Time spent with the family</li></ul>	
Work	<ul> <li>What you want from your career</li> <li>Time and effort you are prepared to spend on your career development</li> </ul>	
Ethics and moral	<ul> <li>What ethical and moral standards do you hold for yourself</li> <li>What ethical and moral standards do you hold for others.</li> </ul>	
Spiritual values	<ul> <li>Importance of spiritual matters in your life</li> <li>The time you give to own spiritual matters</li> </ul>	
Social values	<ul><li>How you use leisure time</li><li>What social activities do you engage in.</li></ul>	

### **CRAFTING YOUR OWN VISION**

A vision is where you want to be in future. It is a road map of your future. Having a vision requires a strong sense of personal purpose. The following illustration shows how you can begin to craft your vision.

### Where am I?

The "where am I" defines where you are right now. This is your current station in the journey of life both professionally and personally.

The environment within which a woman manager operates is essential for personal visioning. This includes both the home and the work environment.

You need to analyse this environment in order to identify things that enhance your growth from which you can benefit.

You also need to identify obstacles that can hamper your personal and growth.

### Where do I want to be?

Identify where you want to be in:

- Short term: X months from now until two years time.
- Medium term: 3-5 years time.
- Long term: 5-10 years time

Goals are what you intend to achieve within the set time frame. All the things you need to do to get where you want to be.

### How will I get there?

The how defines the strategies, tools and tactics, and the personal and professional development activities that you will employ to get to your destination. These will range from things that you can do on your own such as eating less, and exercising more to lose weight if this is one of your short-term goals, to things that will demand more effort and resources over a longish period of time. Acquire an additional qualification, for example, to achieve your career goals.

### **EXERCISE: Identify your goals**

SHORT TERM (This year)	MEDIUM TERM	LONG TERM

### **SETTING PERSONAL GOALS**

Setting personal goals will help you:

- Avoid "busy work" that keeps you busy without contributing to anything beneficial.
- Track and monitor your own progress.
- Identify when you go off track.
- · Persevere in the face of difficulties.

### Setting goals and planning to achieve them involves the following step-by-step activity:

- Defining your objectives.
- Considering anything that might stand between you and your objectives (obstacles).
- Describing specific action steps for achieving your goal.
- Considering what outcomes should come about as a result of your actions.
- Considering performance indicators that will serve to confirm that your objectives are being
- Record the dates by which the actions need to be done when an activity is
- Describe the progress made (performance indicators)
- Develop statements of affirmation in relation to your objectives. This helps to reinforce the achievements gained.

Identify those areas of your life that require a makeover, using the principle that you do not fix something unless it it broken. Identify areas in your personal life that need to be revamped.



# **EXAMPLE OF PRACTICAL STRATEGIC PLANNING EXERCISE**

	ep	00				10													
DATE OF REVIEW	2004 Jan/Feb	March 2003	Jan 2003	June 2003	June 2003	Every quarter													
PERFORMANCE INDICATORS	Graduation by 2006																		
OUTCOMES	Pass the courses I enroll for on record time	)																	
CONCRETE ACTIONS/STEPS	Enroll by distance eduction in 2003	Engage services of domestic worker	Reduce my membership of clubs and societies to 2.	Delegate some responsibilities at work	Design a time table	Submit assignments on time	Pass end of year exams	Graduate in 2005											
HOW CHALLEN- GES WILL BE OVERCOME	Get extra help																		
CHALLENGES	Juggle home and work responsibilities and find time	to be up to date with my studies																	
OBJECTIVES	Achieve M+5 qualifications by 2005																		
BROAD GOAL	Improve own qualifi- cations																		
AREA NEEDING ATTENTION	Academic								Family	Finance	Improve work relations	Spiritual life	Social	Family	Finance	Improve work relations	Spiritual life	Social	Physical and emo- tional well-being

As can be seen, personal success does not just happen. For women managers in particular, this is an area that they need to carefully plan for. Planning is also not the end as a lot of effort goes into the implementation of the plan. If things do not go according to plan do not despair. This is going to be a rough ride with all its ups and downs. If you fall behind you have to be strong enough to get up and pick up the pieces.



# **UNIT 7:**

### MANAGING THE TIME YOU SPEND ON THE PHONE

Women in general are more communicative than men, while certain cultures are more communicative than others. Communication patterns are a question of individual style.

Have you ever listened to a telephone conversation and became irritated because you were made to wait by a person who was engaged in a conversation that was going absolutely nowhere?

### **OUTCOMES**

At the end of the unit the participant should be able to:

- Use the phone to enhance rather than diminish her efficiency.
- Deal with telephonic time wasters.
- Handle telephonic conversations in a professional/ productive way.

### MAXIMISING YOUR EFFICIENCY THROUGH TECHNOLOGY

Use the most appropriate technology for the right reason. If you are just confirming your attendance of a meeting and you want to cut down on time spent on small talk, a faxed message is a better option than a telephonic conversation.

### ADOPT A SCREENING PROCEDURE

Being friendly to your callers does not necessarily mean you should waste time. You will be surprised at how many of the calls you receive can be effectively dealt with by others. Adopt call screening as a matter of routine, which entails:

- Establishing the purpose of the call early in the conversation.
- · Deciding who is best placed to deal with the call.
- Routing the call accordingly.
- If the call is in your line of responsibility establishing the issue.
- Deciding and committing to a turn around time for the response.
- Following up and doing what you promised to save yourself from getting subsequent calls on the same matter.

### **KEEP CALLS BRIEF**

Women tend to spend more time on the phone than their male counterparts. Colleagues and acquaintances can easily fall in the trap of using the phone for chatting, which leads to the serious wastage of valuable resources, including time.

Do you know how much time you spend on the phone? Timing yourself can be a revelation of how unproductive you have become because of the time spent on the telephone. If you have a problem of spending too much time on the phone, the following tips can help you stick to the point when making calls:

- People are less likely to chat, close to knock-off time.
- Speak while standing, the discomfort of standing may encourage you to be brief.



Avoid calling in a comfortable position. Time the length the of incoming calls you receive. This will give you an indication of which people to communicate with via memos, SMS messages or by fax.

Develop a habit of keeping your average call to between 3-6 minutes.

# PLAN YOUR OUTGOING CALLS AND INCLUDE THEM IN THE DAILY 'TO DO' LIST

Decide on the best time to return calls depending on the patterns in your work environment. If you know that people you need to call are often tied up in meetings between 9:00 and 12:00, it is counterproductive to try to call at that time. If there is an office that you regularly call, establish the flow of activities in that office and time your calls accordingly. Your aim is to get what you want the first time around under normal circumstances. For people whom you have difficulty contacting during working hours, establish when the best times to call are. In that way you make others take responsibility for making themselves accessible.

### TIPS FOR HANDLING OUTGOING CALLS EFFICIENTLY

- List the outgoing calls you have to make.
- · Know the issues to be discussed before dialling.
- Prioritise your outgoing calls.
- If reference material will be needed, keep it handy.
- Try to deal with all of them at one go.
- Establish your own pattern, depending on your circumstances.
- Get to the point quickly after introducing yourself.
- · Concentrate on the essentials.
- Where messages are to be left try to leave complete, coherent messages to allow the other person to understand what they are supposed do without needing to call you back.

### MINIMISE THE NEED FOR OTHERS TO CALL YOU

If the memos you send are factually accurate and communicate the message in a clear unambiguous manner, you will be protected from a flood of telephone calls seeking clarification. Before any correspondence leaves your office, make sure that there is no potential for mass confusion emanating from the contents of your correspondence. Where you leave a voice message/message ensure that the message is accurate and complete.

### PLAN A NO-INTERRUPTION TIME FOR YOURSELF

Having ringing phones all day long can effectively mean that you do not have the time to deal with the activities planned for the day. If this is a daily occurrence, it soon builds up to the neglect of weekly/ monthly activities. This should be timed such that it falls within your peak performance period, i.e. time of the day during which you must be most alert. People differ, and while the majority experience peak performance in the mornings, you may have your own pattern!

### DEVELOP PERSONAL STRATEGIES TO COPE WITH LONG-WINDED CALLERS

When spending time on a call ask yourself whether the call is assisting you to accomplish something? Calls that do not take you anywhere make you part of a gossip circle, in addition to wasting your time.





- Avoid contributing to such a conversation and the caller will get the message.
- Indicate your time constraints to the person you are calling or who called. 'I am in between meetings and the next one is starting in the next 5 minutes.'
- If you are calling, indicate to the person you are calling that you need a quick answer. 'Good day X. I need confirmation of time, venue, and date for B meeting.'
- Terminate longwinded callers by telling them your next appointment has arrived, a scheduled meeting is starting in the next 2 minutes or your boss is pacing by your window.

### **EXERCISE**

- 1. You have been on the phone for the past 15 minutes and you are getting frustrated because the caller from regional office is making reference to memos/documents that you need to peruse before giving answers. The more you try to explain, the more confused the issue becomes. How would you handle this situation?
- 2. You have a new secretary who won't give any information to callers no matter how basic before seeking your approval. You are beginning to feel the effects of her behaviour because it leaves you no time to concentrate on your work. How would you handle the situation?
- 3. At home you find yourself having to make several work-related phone calls and at work you also make, as a matter of routine personal calls to friends and family. Is this a problem and if it is, how can you deal with this situation?



# UNIT 8:

### TOOLS USED FOR EFFECTIVE TIME MANAGEMENT

Time management is a question of discipline and will-power, facilitated by a clear understanding of goals and objectives. Calendars, diaries and year planners become enablers that assist the woman manager to stay on course.

### **OUTCOMES**

At the end of the unit the women managers should know what tools are available to assist them in managerial tasks and should practice using these tools to enhance performance.

### **CHOOSING A DIARY**

A diary is not just an appointment book. It should provide space for listing appointments, as well as enough room for comments on:

- · Planning.
- Recording a day's work.
- Telephone call reminders.
- · Meeting notes.
- · Directions to venues.

A diary is a basic tool without which you are lost.

### WHY IS IT IMPORTANT TO KEEP AN UP TO DATE DIARY?

- Prevents unprofessional behaviour, e.g. arriving late for meetings, missing meetings, double bookings, not budgeting enough time to move between venues etc.
- Allows you access to incidents without relying on fallible human memory.
- Increases your confidence because of ready access to key aspects of your work.
- Serves as a constant reminder of the value of time, both professional and personal.
- Allows you to plan personal activities in a manner that does not conflict with work responsibilities.
- Allows you to track patterns over time.
- Enhances your ability to account for your utilisation of time.

### WHAT FACTORS DO YOU CONSIDER WHEN CHOOSING A DIARY?

### CHOOSE A DIARY CAREFULLY

As an important tool of your trade your diary should be chosen with due consideration of its functional utility. In order for it to service your needs maximally, it must:

- Be of reasonable quality and durability- you do not want to have a diary with pages falling out!
- Be of a planner format that will give you all the space you need to use it as a planning tool.
- Provide a time management section.
- Be easy to carry as you must have it with you at all times.





### TIPS ON MAKING YOUR DIARY WORK FOR YOU

It is not enough to have it. To derive maximum benefit from it you must effectively use it.

### Using your diary to your benefit

At the beginning of each year, enter all-important dates, e.g.

- Due dates for certain reports.
- Important meetings.
- Dates for important events.
- Exam dates and due dates for student portfolios.

### Dedicate defined time slots to activities

Each diary entry should have a clear start time and end time Lumping activities into undefined time frames encourages you to be uneconomical in your usage of time.

### Budget for travelling time in your diary

Avoid unnecessary stress and anxiety by budgeting enough time to get to venues for your engagements.

### Give yourself small breaks

15-minute gaps in between activities sometimes works. This allows you to peruse the agenda and documents of the next meeting before it starts if everything proceeds as scheduled. If things do not go according to plan it at least allows you time to finish your late appointment before proceeding to the next one.

### Schedule rest periods (tea break/lunch break)

The more exhausted you are, the more errors you make. If you go non-stop you will soon run yourself into the ground. This is important, even if you bring your own lunch.

### Book time off for projects

If you have a long-term project, work back from the due date and determine how much time and what activity you need for each stage. Block time in your diary to dedicate to the project. Make sure that you also follow this approach with school projects. This will go a long way in preventing you from last minute anxiety on the eve of the project's due date.

### Avoid scheduling all-day activities

If you can help it, avoid scheduling all-day activities as this can set you back with office work. At least schedule activities such that you can be in the office for an hour before the activity starts.

### That allows you to catch up with emergencies.

Scheduling of work activities that run to after-hours

If such activities have to be done, make sure that you schedule at most one activity per week, instead of several days in one week. This will avoid the stress and guilt that comes with feeling like an absent mother.

### Use these guidelines in managing your own personal time

Using these guidelines in your personal life will help you establish boundaries in terms of:



**SELF MANAGEMENT** 

- · Time for the home.
- Time for your spouse.
- Time for friends.
- Time for children.
- Time for yourself.

### **USING YOUR DIARY ASSERTIVELY**

A diary is just a tool that helps you organise. It does not do what you are supposed to do. You must commit to or decline certain activities in terms of your workload. The following are the tips that can help you use your diary assertively:

- Develop a habit of not committing yourself on the spot to things that fall outside of the scope of your core responsibilities.
- Do not allow yourself to be fooled by flattery. 'We know we can always count on the services of Ms Y to generate a brilliant report.'
- Educate your colleagues to respect your time. Start meetings on time and stick to the agenda.
- · Gently discourage late-comers.
- When in doubt about your availability to do something, decline.
- Educate your children that you are not on standby for their demands. They must learn to ask in a timely manner that allows you to plan accordingly.
- Do not be blackmailed into agreeing because your children ask you for something in front of other people. If it does happen, tell them that you are still going to think about it.
- Avoid making impulsive decisions.
- Educate your spouse and children to respect your personal time.
- If you are planning on working after hours, let all the affected parties know in advance and put in place a contingency plan.
- · Commit to what you can do and say no to what you cannot do without feeling guilty.
- At the point of realising that you have diary clashes, decide what you are not going to do and notify the parties involved accordingly.



# UNIT 9:

### HANDLING CASUAL VISITORS

As a woman you are inclined to want to accommodate others, to provide a shoulder to cry on and to connect by welcoming everybody at anytime. Stop for a moment and consider the effect of this on your deadlines, your professional image, the image of your office and perceptions of colleagues and subordinates alike.

An unrestricted 'open door policy' can be detrimental to your productivity, image as a professional manager and to your health.

### **OUTCOMES**

At the end of the unit woman managers should be able to:

- Intercept unannounced visitors.
- Politely discourage unannounced visitors.
- · Curtail those drop-in visits they cannot avoid.
- Develop a sense of judgment and courtesy that will allow them to save time without offending unannounced visitors.

### **SELF MANAGEMENT**

WHAT IS THE MOST SERIOUS PROBLEM ASSOCIATED WITH THE ARRIVAL OF CASUAL VISITORS THAT YOU FACE?
WHAT BEHAVIOUR DO YOU NEED TO CHANGE TO DISCOURAGE DROP-IN VISITORS?
WHAT STRATEGY ARE YOU PLANNING ON USING TO MINIMISE DROP-IN VISITORS?



### STRATEGIES TO DEAL WITH DROP-IN VISITORS

### **Utilising support staff**

If you have a secretary, empower her to decide what is urgent and what can wait. This often involves coaching. Once your secretary is empowered, your life becomes easier.

If you use a shared administrative assistant/receptionist then make sure that in your scheduling of activities in your diary, you set aside consultation hours if the nature of your work warrants this. Then provide the administrative assistant with these time slots so she/he can route drop-in visitors accordingly.

### Check your body language

Does your body language invite passers-by to drop in? If you appear relaxed and inviting and not so busy people will be tempted to drop in. You may also consider changing your office lay-out such that you have your back to the passers-by.

### Set boundaries for unscheduled visitors

If people know they can see you for whatever time without an appointment, they will never bother to make one. Instill discipline among co-workers and colleagues by letting them know that you can spare a very limited time for unscheduled visitors. Be upfront, firm and unapologetic about this, e.g. "I can spare five minutes. Should you need more time make an appointment".

### Use your sense of judgment

Different issues call for different responses. Use your judgment to determine whether the issue at hand deserves to be handled right away. If so, do just that! If it is matter that can be dealt with in the weekly staff meeting, route it accordingly!

### Tips for keeping casual meetings short

If the casual visitor caught you on your way somewhere, ask them to walk with you to the venue of the other meeting and discuss the issue on the way. Encourage them to be brief because you are already running late!

### Talk with the casual visitor where you met

If you have met the drop-in visitor in the hall-way, indicate to him/ her that you are on your way somewhere and talk about the issue right there.

### Talk while standing

To encourage the drop-in visitor to hurry up, do not offer a seat. Talk to him/ her while standing to communicate that you are in a hurry!

### Do not offer casual visitors something to drink

Offering them something to drink creates an impression that you are available and do not mind being interrupted. You can make an exception for someone from afar who is less likely to drop in regularly!



### Communicate verbally and non-verbally that you are out of time

Keep checking your watch/clock. The drop-in visitor will hopefully get the message or get your secretary to remind you as a matter of routine with drop in visitors that you are due for your next engagement.

### **DISCOURAGE PERSONAL CASUAL VISITORS**

In your quest to develop a professional image, you cannot afford to flood the office with personal visitors on a regular basis, be it your friend/ relatives/ or even your children.



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



# PREFACE: SEXUAL HARASSMENT

The Constitution of the Republic of South Africa guarantees freedom from all forms of harassment. With the advancement of women's issues, sexual harassment has gained prominence in the recent past. Despite strides made in bringing to the fore debates about harassment issues, harassing behaviours continue to occur in the place of work, sometimes without the perpetrators even realising it.

Sexual harassment, as just one form of harassment, has shot to prominence as women begin to assert their rights. Sexual harassment continues to affect women more than men. Since sexual harassment continues to be clouded in mystery, some forms of sexually harassing behaviours continue to go unchallenged, while in other instances, innocent behaviours get to be construed as sexual harassment. This module aims to clear the mystery around the subject of harassment as well as sexual harassment, with the aim of helping participants understand what constitute harassment and sexual harassment.

The module seeks to clarify what women managers can do to avoid exhibiting behaviours that can be construed as harassing, and what to do should they become victims of harassment. The module also seeks to empower women managers to deal effectively with sexual harassment allegations in a diverse workplace in a manner that allows for harmonious existence of all cultures.

The issue of handling harassment cannot be seen in isolation as it is intimately linked with the question of assertiveness. Harassment and sexual harassment are effectively about abuse of power that leads to the violation of the victim's rights. The victim has to be assertive in order to follow the right channels and take appropriate action to deal with all forms of harassment.



# **EXPLANATORY NOTES:**

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FACILITATOR'S INPUT/NOTES

This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.



**HINTS** 

This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.



**ROLE-PLAY** 

This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who participated actively in the exercise.



**EXERCISE** 

This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.



**CASE STUDY** 

This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.



**SELF-TEST** 

This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.



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# INTRODUCTION

The promulgation of the laws and regulations protecting the rights of all parties and groups has made harassment in the workplace a minefield. Protection from all forms of discrimination is a constitutional right and women managers need to assert their own rights while behaving in a manner that shows respect for the rights of others.

The purpose of this module is two-fold. First, it serves to sensitise women managers about the rights of others that they should respect while they execute their managerial responsibilities. In the second instance, it illustrates the importance for women managers to be in a position to protect themselves against all forms of harassment at the workplace.

# **BROAD AIMS**

At the end of this module, women managers should:

- Appreciate the statutory provisions that protect everybody against all forms of harassment
- Understand and identify the various forms of harassment.
- Know the options available to them for dealing with harassment.
- Apply knowledge and insight gained in practical exercises.
- Know what steps to take in dealing with harassment.
- Take corrective measures to deal with incidences of reported harassment of subordinates.



# **UNIT 1:**

# **UNDERSTANDING HARASSMENT**

# **OUTCOMES**

At the end of the unit, the participants should be able to:

- · Understand what harassment is.
- Identify different forms of harassment.
- Identify sexual harassment.
- Identify both subtle and blatant forms of harassment.

### **DEFINITIONS**

# WHAT IS MEANT BY 'HARASSMENT'?

For purposes of this module, harassment is defined as continual annoyance or repeated attacks on an individual's space or privacy based on one or more of the following:

- Race.
- Gender.
- · Pregnancy.
- Marital status.
- Social/Ethnic origin.
- Religion/Conscience.
- Belief.
- · Culture/Language.
- · Nationality/Origin.

# WHAT IS MEANT BY SEXUAL HARASSMENT?

Sexual harassment has been broadly defined as including behavioural categories of gender harassment, unwanted sexual attention and sexual coercion.

### WHAT IS GENDER HARASSMENT?

Gender harassment refers to more than just gender bias. It includes crude words, acts and gestures conveying hostile misogynist attitudes.

# WHAT IS SEXUAL COERCION?

Sexual coercion refers to forced sexual relations in return for job rewards, be it promotion, hiring, getting preferential treatment, etc.

### WHAT IS SEXUAL ASSAULT AND RAPE?

Sexual assault and rape are criminal offenses and they must be handled as such. Sexual assault is an extreme form of sexual harassment in that it involves physical contact. Among colleagues, some form of sexual harassment often precedes it.



Determine whether the following examples represent sexual harassment, sexual coercion or gender harassment.

EXAMPLES		
1.	Accidentally bumping against a co-worker's shoulder.	
2.	"I cannot understand how you people think."	
3.	"If you want to go places, stick with me and be a good girl."	
4.	"Can't you get this through your thick skull, you b****".	
5.	"I cannot get you out of my mind. I can just imagine how it would be to be with you".	
6.	"If you do not (you know) with me, you may as well forget about that promotion".	
7.	"Do not play games with me. You know what I want".	
8.	Receiving a sexually explicit SMS message or e-mail from a colleague.	
9.	"One day it will be just you and me, and I'll show you".	
10.	"Being touched by a colleague who, as matter of habit, is "touchy".	

# LEGAL FRAMEWORK AGAINST HARASSMENT

The Constitution of the Republic of South Africa guarantees equality and rights to equal protection under the law. This right is guaranteed for all people regardless of race, gender, sex, pregnancy, marital status, ethnic or social origins, sexual orientation, age, disability, religion, conscience/belief, culture, language or birth. The Employment Equity Act prescribes that the working environment should be free of discriminatory practices, including sexual and other forms of harassment.

# **EXERCISE**

Think of possible examples in the workplace that can be an indication of harassment based on religious grounds, pregnancy, marital status, disability, ethnic and social origins, age and sexual orientation. How common are such incidents of harassment at your workplace?

RELIGIOUS GROUNDS	
PREGNANCY	
MARITAL STATUS	
DISABILITY	
ETHNIC AND SOCIAL ORIGINS	
SEXUAL ORIENTATION	

# UNIT 2:

# ATTITUDES AND BELIEFS THAT PREVENT SEXUAL HARASSMENT FROM BEING TAKEN SERIOUSLY

Sexual harassment continues to happen in the workplace despite legislation prohibiting all forms of harassment. Refer to the Employment Equity Act and the Constitution. That the school system continues to be notorious for harassment of both learners and employees despite the strides made in legislation can be attributed to the fact that legislation does not change attitudes. It is still widely believed that it is acceptable to treat women as objects of male pleasure and enjoyment. One must however not lose sight of the fact that some men are also victims of harassment.

# **OUTCOMES**

# At the end of this unit, participants should:

- · Have revisited their own attitudes and beliefs about sexual harassment.
- Determine how such beliefs contribute to sexual harassment.
- Take practical steps to change such attitudes and beliefs.

# BELIEFS THAT PROMOTE HARASSMENT

HELD BY PERPETRATOR	HELD BY PERPETRATOR
My status allows me to do as I wish.	What can I do? He is my boss.
She likes it too, she is just pretending.	I have said no, yet he won't leave me alone, unless I give him what he wants.
Women say no when they mean yes.	What is the point of saying no, when he does not give up?
What is the big deal? It is not like she is a virgin!	It is no use trying to be good. Other people do these things.
How can she not want me? No woman has ever resisted me	It enhances my status to have a relation- ship with the boss.
I am just kidding. Why should she take everything so seriously?	If I complain they will think I am petty.
I am just teasing. I am not denigrating her religion, race, social, class, or ethnic group.	am uncomfortable about it but I do not want to rock the boat.
I can pin on my office walls any picture that I like, anyone who has a problem with it, tough luck!	I am so embarrassed going to his office. I will just try and avoid that as much as possible.



# ATTITUDES THAT ENCOURAGE THE CONTINUATION OF SEXUAL HARASSMENT IN THE WORKPLACE

### "SEXUAL HARASSMENT ONLY HAPPENS TO WOMEN"

Contrary to popular belief, sexual harassment affects men perhaps as much as it affects women. Men may be objects of sexual harassment by gay men as well as by women in positions of authority. As the South African society becomes more open to other types of interpersonal attraction, it is not unreasonable to anticipate that sexual harassment will also assume other forms.

Men who are objects of sexual harassment often become more traumatised than women as they often begin to question their own masculinity.

# "SEX DOES NOT BELONG IN THE WORKPLACE"

Many confuse sexual harassment with normal sexual attitudes, expressions of sexuality and attitudes towards sex. People holding these beliefs often choose to ignore unwarranted sexual advances believing that it is inappropriate to bring up matters of sexuality in the workplace. Sexual harassment is not only about sex. It is also about 'sexual exploitation,' and as such, it can be devastating to the victim.

# "JOKES ABOUT SEX ARE FUNNY"

There is nothing funny about behaviour that makes others feel degraded and embarrassed. It is not funny if the sense of self-worth and self-esteem and job performance of a co-worker suffers because of 'jokes' or 'practical jokes' by their colleagues.

It takes maturity to realise that in a diverse workplace, what is funny to one can be offensive to the next person. Respecting everybody's background often means being sensitive and enjoying oneself in a manner that does not offend others.

# "'THERE IS NO SUCH THING AS SEXUAL HARASSMENT – WOMEN ENJOY THE ATTENTION"

It is human to feel good about being wanted and the recipient of sexual attention enjoys it. One should not be embarrassed to admit it. There is, however, a major difference between enjoying sexual attention and experiencing sexual harassment. It boils down to respecting the views of the next person. In instances where the woman or man enjoys sexual attention, it must be assumed that they will act in a manner that encourages such attention. If they act in a contrary manner, their wishes must be respected.

Think of the diverse groups that are represented at your work environment – both employees and learners. Consider the following types of behaviour and determine whether they constitute sexual harassment. Your response should take different cultural backgrounds into consideration.

INCLINATION TO TOUCH COLLEAGUES		
TENDENCY TO COME TOO CLOSE		
TENDENCY TO STARE		
TENDENCY TO RESPOND TO STARES BY LOOKING DOWN		
DISPLAY OF BARE-BREASTED PICTURE OF A WOMEN IN (AFRICAN) TRADITIONAL ATTIRE		

DISPLAY OF PIN-UP PICTURES	
ASKING FOR A DATE	

# REGULATING ATTRACTION BETWEEN TWO PEOPLE

It is not possible or desirable to legislate who may be attracted to whom. If a person is sexually attracted to another, it is normal to express that. Once the object of attraction has stated their lack of interest they have a right to be left in peace.

# **SELF-AFFIRMATION**

If I keep quiet the perpetrator will not know that I do not appreciate what he/she is doing. He or she will not know that I have a right to be left in peace and I have no obligation to extend any sexual favours to anyone.

While people have a right to express an emotional interest towards others, the objects of attraction, have a right to either accept or decline.



# **UNIT 3:**

# CROSS-CULTURAL DIFFERENCES IN BEHAVIOUR THAT CAN BE CONSTRUED AS HAVING SEXUAL CONNOTATIONS

Different cultures have different behavioural tendencies that people coming from other cultures can misinterpret as having sexual connotations. For example, in the South African context, one may find that there are cultural or even gender differences in the manipulation of physical distance, with African people often tending to interact at a much closer range than their white counterparts.

# **OUTCOMES**

# At the end of the unit, participants should:

- Have an increased awareness about cultural differences.
- Have a sense of how these differences can be easily misinterpreted as sexual harassment.
- Be sensitised to different cultural tendencies and encouraged to monitor their own behaviour.

# THE RELATIONSHIP BETWEEN CULTURE AND BEHAVIOUR

IN YOUR EXPERIENCE, ARE THERE SIGNIFICANT WAYS IN WHICH AFRICAN CULTURES DIFFER FROM THEIR WESTERN COUNTERPARTS? LIST WAYS IN WHICH CULTURES DIFFER.		
·		
GENERATE A LIST OF ASPECTS OF BEHAVIOUR THAT CAN BE POSSIBLY CONSTRUED AS HARASSMENT, INCLUDING SEXUAL HARASSMENT, FROM THE CULTURAL DIFFERENCES LISTED ABOVE.		
·		

In considering the influence of culture on behaviour, it should be acknowledged that culture is dynamic and ever changing. However, there remain aspects of culture that are sufficiently distinctive and durable for them to exist as separate cultures. It is these enduring aspects of different cultures that make up South Africa's diversity. Linguistic and cultural differences extend to specific behavioural tendencies as exhibited by people of different groupings.

Western cultural orientation	African cultural orientation
Individualism	Communalistic
Comfortable at a distance	Expresses interest and concern by coming close
Values personal space	Interacts at close range
Emphasis on task and outputs	Emphasis on people
Use of first names/official titles	Use of terms of endearment
Interest in the issues	Interest in the person and the issues

# **EXAMPLES OF EXPRESSION OF CULTURAL DIFFERENCES**

- Africans tend to come too close, often to the discomfort of their white colleagues.
- Africans tend to be touchy without meaning to offend.
- Africans are more inclined to use terms of endearment much to the annoyance at times, of their white counterparts.
- The tendency of Africans to emphasise feelings can be construed as being nosy, as an invasion of privacy, and as an intrusion.
- Interest in the person's well-being can be construed as invasion of privacy.

# TIPS FOR AVOIDING ENGAGING IN BEHAVIOURS THAT CAN BE CONSTRUED AS SEXUAL HARASSMENT

- · Avoid sending mixed messages.
- Adopt an attitude that professional behaviour is defined according to Professional Code of Conduct for Educators and act as a professional at the workplace.
- In situations where you behave in a manner that is construed as having sexual overtones, immediately apologise and change your conduct.
- Make sure that you do not repeat behaviour that you have apologised for in the past, otherwise your behaviour constitutes harassment.
- Always be consciously aware that behaviour is appropriate only to the extent it is in line
  with the context. What close friends find acceptable may be offensive to mere acquaintances and colleagues.
- Pay attention to non-verbal cues given by colleagues. A frown may indicate that your behaviour is not clearly understood or acceptable.
- Where misunderstandings arise, set the record straight immediately.
- If uncertain about whether the behaviour is offensive or not, err on the side of caution.
- Seek to understand and appreciate the diverse groups you work with.



# **EXERCISE**

A male subordinate gets very nervous when you talk to him. There have been instances where you felt he was avoiding you, and his behaviour is getting to a point that you feel that is hindering productivity. Recently he came up with all sorts of lame excuses to avoid travelling with you to the district office. You have been travelling with your preschool child and have always been overprotective to the point of extending your hand to touch her whenever you have to apply brakes. This has developed into a habit of doing the same to whoever is sitting in the front seat. You have travelled with the male subordinate in the past. What do you think is the problem? How would you tackle it?



# **UNIT 4:**

# HANDLING SEXUAL HARASSMENT AS A VICTIM

Being a victim of sexual harassment can happen to anyone, men and women alike. Sexual harassment also knows no rank. It can happen to you irrespective of whether you are an employee or a manager. It is important to know what immediate actions are necessary in cases where you feel you are being sexually harassed to prevent further transgressions.

# **OUTCOMES**

To equip participants with the skills they need to deal with instances where they may be the victim of unwanted advances, by:

- Assertively confronting the perpetrator.
- · Assertively stating their wish not to be harassed.
- Deciding on the route of action to put a stop to possible further transgressions.

# TAKING STEPS TO COMBAT SEXUAL HARASSMENT IN THE WORKPLACE

#### DO NOT IGNORE THE PROBLEM

By ignoring the problem, you effectively become part of it and you prevent the perpetrator from learning that you are protected against such violations of Constitutional and other legal rights. The perpetrator needs to learn to respect your rights. Rights are meaningless unless you take charge and assert them. Speak up and help combat sexual harassment in the workplace.

You do not 'keep the peace' by not speaking up. If someone keeps making sexual advances that you do not appreciate and you do nothing about it, how is the perpetrator expected to know you do not appreciate his/her advances.

# CHECK YOUR OWN UNDERSTANDING

Is this a single occurrence, e.g. in the heat of excitement about good learner performance in the matric exams, a male colleague hugs and kisses you. Is the behaviour one that suggests some underlying pattern, e.g. every time you hand something to your boss he grabs your hand.

# ASK YOURSELF THE FOLLOWING QUESTIONS:

- Has this behaviour happened before?
- · Are there other ways of interpreting the behaviour?
- Is this happening to me only or have I witnessed the perpetrator behaving in similar ways with other people?
- How do I feel about this behaviour?
- What is the context? Does the context justify the behaviour?
- Is there a logical reason for the behaviour such as the boss approaching you behind your desk because stacks of boxes in front of the desk prevent him from approaching you from across your desk?
- Are there any cross-cultural or cultural issues that you need to consider?



# DECIDE ON THE COURSE OF ACTION TO TAKE

There are different ways in which you can take action against sexual harassment. If you have not spoken to the perpetrator about what you consider to be sexual harassment, the first step would be to approach him or her immediately. Remember that for the behaviour to qualify as sexual harassment, it has to be unwanted, unwarranted and unwelcome. You owe it to the perpetrator to inform them that you find the behaviour offensive. It is your responsibility to bring it to the offender's attention.

Whatever course of action you take, remember at all times that you should not allow yourself to be intimidated. Approach the matter in a level-headed, factual and assertive manner. Try by all means to remain coherent and unemotional.

Should you choose to approach the matter by confronting the perpetrator, your opening lines could include such statement as:

- Every time I pass you something, you grab my hand. This makes me feel uncomfortable. Is there any reason for that?"
- I have told you before that I hate it when you stand behind me like that. I do not know why you do this. It makes me feel that my space is being invaded."

If the response of the perpetrator does not yield the desired results, you could arrange a formal meeting with them. It is important to be mindful that you:

**Follow standard procedures to request a meeting with the perpetrator.** You do not want procedural irregularities on your part to detract from this important matter.

• Describe the offending behaviour in detail. Before you approach the alleged perpetrator, make sure to recall the specific details about the date, place and time of earlier incidents to prevent the perpetrator from denying what you are talking about.

If the perpetrator tries to avoid the discussion or dismiss your allegations as imaginary, firmly indicate that it will be in his/her best interest to listen because you will take further steps if you do not get co-operation.

# **DURING THE MEETING**

# DO NOT ALLOW THE ALLEGED PERPETRATOR TO TAKE CONTROL OF THE MEETING

Politely indicate that there is a specific reason why you requested the meeting and insist that you be given an opportunity to have your say without interruption.

# AFFORD THE PERPETRATOR AN OPPORTUNITY TO EXPLAIN

Always remember that the perpetrator has a right to be heard. Respect his rights even though he may not have respected yours. Keep an open mind when listening to his or her explanation. Maybe he/she has a point you had not considered.



# WHAT IF YOU MISINTERPRETED THE PERPETRATOR'S BEHAVIOUR?

This is possible in first instances of transgression, especially in a multicultural environment. If you are satisfied with the explanation, this closes the case. You just need to indicate to the perpetrator that you interpreted the situation differently and you did not mean any malice.

### **MUTUAL RESPECT**

Take every opportunity to foster an attitude of respect for the rights of others by treating colleagues with respect, consideration and dignity. This includes the alleged perpetrator. Before concluding a meeting convened to resolve differences construed as sexual harassment, thank your counterpart for their time and express the hope there will be no need for similar discussions.

# MAXIMISING YOUR IMPACT DURING THE MEETING

- Prepare thoroughly for the meeting.
- Make notes concentrating on the exact details of the behaviour you are referring to and stay focused.
- Send a clear message that you find the behaviour offensive and that it will not be tolerated.
- Clearly indicate that you want the offending behaviour to stop.
- Express a clear warning that if the behaviour does not stop you will take further steps.
- · Your verbal behaviour must be consistent with your non-verbal behaviour.
- Practice before a mirror or a trusted friend before you approach the perpetrator.

# **ROLE-PLAY**

You have just arrived from a meeting at the district office where you felt embarrassed and humiliated because a district official was coming on you in full view of other officials, who did not say a word. He was asking you very personal questions and despite all the indications you gave of a lack of interest, he persisted.

Plan to confront him.

Phone the district official to request a meeting.

Prepare for the meeting.

Role-play the meeting with one of your colleagues serving as a district official.

# HOW TO RESOLVE THE SITUATION IF YOU ARE INTIMIDATED BY THE PROSPECT OF CONFRONTATION

Write a letter. If you are intimidated by the prospect of confrontation, or you simply do not have the courage to confront the perpetrator, just write him/her a letter. If you go this route, it is important that your letter be written in a manner that deserves to be taken seriously.



# **SELF MANAGEMENT**

### **EXAMPLE**

Letter of complaint about perceived gender harassment:

Ms BL Goodmorning Kimberley West High 33 Sydney Road Kimberley 15 January 2002

Mr JL Seeyou The Circuit Inspector Kimberley West District Private Bag X1516 Kimberley 1000 Telefax No: 345-6789

Dear Mr Seeyou

### PERCEIVED GENDER HARASSMENT

The meeting of January 11 held at the district office has bearing. During this meeting, you displayed behaviour that I perceive as inappropriate at best. Ahead of the meeting you made jokes about women and g-strings to a group of participants in my presence. Being the only woman present, I felt humiliated and embarrassed.

During the meeting, you suggested that as the only woman present I should take minutes. Later, during tea you expressed your surprise at the fact that I did not pour tea for everyone.

Failing a suitable explanation, I am left with no alternative other than to consider your behaviour a form of harassment. The view that the role of women is subservient to that of men is prejudicial, antiquated and amounts to ignorance. This I cannot tolerate.

At meetings I expect to be treated as a professional and I find your constant references to my gender both irritating and irrelevant.

I would appreciate an explanation for your repeated remarks so as to rectify any misunderstandings I may have about events on the day in question.

Kindly acknowledge receipt of this letter.

Thank you.

Yours sincerely,

Ms B L Goodmorning

Principal: Kimberley West High



### BENEFITS OF AN INFORMAL APPROACH

- It often yields results without a major uproar.
- It corrects the behaviour while protecting the dignity of the perpetrator.
- Where misunderstandings have arisen, it corrects these without wasting time and effort of both parties.
- Consider an informal approach as necessary for first transgressions. Should you feel completely overwhelmed, consider contacting the sexual harassment contact person or SHRP in your area.

# UNIT 5:

# LODGING A FORMAL COMPLAINT

The approaches that have been dealt with so far are informal in that they deal directly with the perceived offender. The approach adopted in resolving a matter of harassment depends on policy provisions and the information provided here. This may change in keeping with the most recent HRM Resolutions.

Sometimes it becomes necessary to lodge a formal complaint.

# **OUTCOMES**

Having completed this unit, participants should be in a position to:

- Make informed decisions about what approach to adopt.
- Take an appropriate course of action by protecting their right not to be harassed.
- Know the consequences of formal approaches.
- · Apply knowledge gained in a role-play.

# DEALING FORMALLY WITH HARASSMENT

# Harassment of an employee by a colleague:

- In such a case, the victim of harassment must first convey the undesirability of the actions of the perpetrator to the perpetrator.
- If the behaviour persists, the victim should report the instances of harassment in writing to their immediate supervisor in keeping with the principle of progressive discipline.
- The supervisor may inquire into the grievance following stipulated grievance procedures.
- Failure of the line manager to act on alleged harassment renders the line manager guilty of condoning harassment.
- Should the immediate line manager fail to resolve the matter, the grievance should be filed with the manager next in the institutional hierarchy.
- Should the line manager fail to resolve the problem at a school level, the grievance can be escalated to the level of the district office.



### WHAT IF THE PERPETRATOR IS A LINE MANAGER?

State your grievance in writing to the next senior manager in the organisation in keeping with reporting lines.

# **CASE STUDY**

- 1. Suppose Ms X had an affair with the principal. Ms X wants to end this affair and the principal does not want to accept this. He keeps following her, inquiring about her whereabouts and cannot stand to see her chatting with male colleagues. Does this case qualify as sexual harassment?
- 2. The HoD had an affair with a young teacher before she joined the school. The affair continued after her appointment. The HoD then decides to marry someone else. The teacher, feeling scorned, then decides to file a sexual harassment complaint against the HoD. Is this a legitimate case of sexual harassment? Under what circumstances would this scenario qualify as sexual harassment?
- **3.** A district official who is known to have a roving eye approached a young female applicant for a position. He started telling her that he could "pull strings" and get her appointed if they could be friends " ... you see what I mean?" The applicant replied by saying she easily made friends but has had no experience of a planned friendship, upon which the district official said" oh that is easy, I can show you". At that point he reached across the table and tried to touch her, at which point she retreated.

Which ones of these three cases constitute sexual harassment and why?

# PRACTICAL CONSIDERATIONS

# DO NOT USE SEXUAL HARASSMENT TO ADVANCE YOUR OWN AGENDA

Alleging sexual harassment on the eve of your own disciplinary inquiry on alleged misconduct casts doubts on the validity of your allegations and morality.

# DEAL WITH OFFENSIVE BEHAVIOUR IMMEDIATELY

Taking immediate action helps prevent doubts about your motives. Do not allege sexual harassment as a means of reprisal for some offense you perceive to have been perpetrated against you.

# FOLLOW THE GRIEVANCE PROCEDURE METICULOUSLY

You do not want to give anyone a reason to throw this matter out on the basis of procedural irregularities.

# PREPARE YOURSELF PSYCHOLOGICALLY TO ACCEPT THE FINDINGS OF A FORMAL INQUIRY

This is important as the outcome of the inquiry can go either way. Be prepared to accept the findings whether they are in favour of or against the perpetrator.



### ADOPT A CONSTRUCTIVE APPROACH TO ASSERTING YOUR RIGHTS

In order to move on with your life and your career, you should also adopt a constructive approach to asserting your rights. The main motivation should be to build, and not to destroy.

After following a formal or informal route, be prepared to give the perpetrator a chance to proceed with his/her life. The purpose of the whole exercise is not to destroy anyone but to assert your rights and protect your dignity.

# **EXAMPLE**

You think that a senior official in the regional office is winking at you. You are not quite sure of this. He is new and you do not know him. Nevertheless you feel uncomfortable because of what you perceive as a sexual advance. Once he asked you a question that you felt was personal and inappropriate.

Outline what you would do, following the guidelines given below?

Check you own perceptions.

Deal with the matter after checking the accuracy of your perceptions



# UNIT 6:

# HANDLING INSTANCES OF SEXUAL HARASSMENT OF SUB-ORDINATES BY SENIOR MANAGERS

Harassment of a subordinate by a senior line manager is perhaps the most serious and common form of sexual harassment in the workplace. It involves the abuse of power in that the senior employee wields some authority over the subordinate. Under such circumstances, sexual favours by the victim or subordinate are expected, in order for them to get a job, keep a job, be promoted or enjoy favourable working conditions. This includes the harassment of applicants for jobs by staff vested with the authority to make new appointments. Because of the possible implications of harassment of subordinates by superiors, the complainant should file a formal grievance with the relevant district office, and where possible seek union representation.

### **OUTCOMES**

Having completed the unit, participants should be in a position to:

- Intervene constructively in cases of alleged sexual harassment.
- Advise subordinates about the appropriate route to take.
- Educate perpetrators about the implications of sexual harassment.
- Play a constructive role in the fight against all forms of harassment.

# THE ROLE OF WOMEN MANAGERS IN THE FIGHT AGAINST ALL FORMS OF HARASSMENT

Women managers have an important role to play in breaking old habits on matters pertaining to harassment, and they can effectively play this role by taking every opportunity to:

- Educate both the victims and the perpetrators about the evils of harassment and sexual harassment.
- Inculcate a culture of human rights in their sphere of influence.
- Lead by example in respecting individual dignity.
- Treat all parties fairly, even in face of allegations of harassment.
- · Educate themselves about multi-culturalism.
- Respect the different cultures of both employees and learners.
- Ensure that in the face of allegations amounting to harassment, proper procedures are followed. Justifiable allegations against perpetrators cannot be dismissed simply because of procedural irregularities.

# WHAT TO DO ABOUT ALLEGATIONS OF HARASSMENT

Establish the extent to which the complainant understands the seriousness of the allegations and the scope of the consequences. It does not help to proceed vigorously only to find that the complainant is not prepared to pursue the matter to its logical end. Draw the complainant's attention to the latest Departmental Policies and Resolutions in this regard. Make sure the complainant understands all the options available in pursuing the matter depending on:

- The gravity of harassment.
- The number of incidents.
- The range of avenues available to deal with incidents of harassment.
- Assist the complainant to choose an option that she/he can live with.



Handle the matter with **sensitivity**. It is important that you proceed with utmost caution to protect the dignity of the complainant as well as that of the alleged perpetrator.

Treat the matter with absolute **confidentiality**. Except for witnesses, any allegation is an absolute confidential matter. You do not want to publicise this matter as the outcome of the investigation may find the allegations unfounded.

Do not take sides. In executing your duties it is important that you be seen to be **objective** and **impartial**, difficult as it may be, especially if you have been a victim of harassment yourself. Operate on the presumption of innocence until proven guilty.

Draw the complainant's attention to the **Departmental Resolutions and Policies**.

Confine the investigation to the **specific alleged instances** only. Be aware that you can only concentrate on the specific reported instance and all those involved as witnesses can only testify to the specific incident. This will prevent a witch-hunt.

Treat alleged harassment as a form of misconduct. The woman manager dealing with harassment must be **reasonably conversant with disciplinary procedures** from the investigation phase to conducting the hearing and communicating of the findings. Again, you do not wish to absolve a perpetrator of an offense because of procedural irregularities.

**Act immediately**. Unexplained delays between the alleged act of misconduct and the ensuing inquiry cast a shadow of doubt over the motives for pursuing the matter. Take immediate action as soon as allegations are made.

# GUIDELINES FOR CONDUCTING A PRELIMINARY INVESTIGATION INTO ALLEGED HARASSMENt

The current Departmental Resolutions and Policies as well as the provisions of the Employment of Educator's Act provide the basis for conducting an investigation. The woman manager needs to keep abreast of developments in these two areas.

# INTERVIEW THE COMPLAINANT

This is the natural first step. Once the complaint has been received, wait for the complainant to calm down if she/he is incoherent. Once the complainant has regained composure, determine:

- Exactly what happened?
- · When it happened?
- · Whether anyone else was present and who?

### INTERVIEW THE ACCUSED

Keep an open mind, irrespective of how infuriating the version presented by the complainant may appear. The alleged perpetrator has a right to be heard and is entitled to administrative justice. The purpose of the interview with the accused is to establish his side of the story.



### **ESTABLISH:**

- Exactly what happened?
- When it happened?
- Who else was there?

### DEALING WITH ALLEGED SEXUAL HARASSMENT OF MEN

Remember that a violation of men is as traumatic because it represents role reversal from the norms accepted by society. It is even harder if a male victim of sexual harassment has to report this to a woman manager. Treating his case with insensitivity can easily lead to more harm, with all sorts of psychological ramifications. Deal with male victims of sexual harassment with the same empathy as female victims.

# COMMUNICATE THE RESULTS OF YOUR PRELIMINARY INVESTIGATION TO BOTH PARTIES

Nothing is as disconcerting as reporting something like perceived sexual harassment and you do not get any feedback for months. Equally problematic is being told that you are an accused and having stated your side of the story, you do not hear a thing for ages. Once an objective decision has been taken about how to take the matter forward, both parties need to be informed accordingly. The way forward can be in line with either the disciplinary or the grievance procedure. In both cases, DoE's policies and procedures will need to be followed.

### **ROLE-PLAY**

- 1. A male subordinate storms into the office to complain about unwanted sexual advances coming from one of your female subordinates. This, according to this male colleague, started with the female asking for favours, which at the time he freely obliged to. Once the female colleague made a move on him he told her that he was flattered, but no thanks, as he was getting married soon. The female subordinate started spreading rumours about the complainant, saying that the reason she was rejected was because he was gay. These rumours are so rife that they are threatening his relationship with his fiancée.
- **2.** In the presence of everyone in the staff room, a male boss complimented a female subordinate on her outfit and curves, much to her embarrassment and humiliation.



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# FACILITATOR'S GUIDE: ON WOMEN MANAGERS AND LEADERS AND LAW

### 1. BACKGROUND TO THE MODULE

This guide is based on the principle that learning occurs through reflection. This reflection questions one's own insights and actions.

As a facilitator, therefore, recognise that this manual is designed to be both a training manual and a resource book for women managers who already have knowledge and experience on the issues discussed.

Also, recognise that participants will gain and create knowledge based on their concrete experience.

Allow the participants to reflect on that experience and to test the implications of the information provided within the learning process.

### 2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire and get responses two weeks before the workshop commences in order to establish what training needs should be addressed in the workshop.
- Select themes to be covered from the manual according to the identified needs.
- Also, decide on the degree of emphasis according to the data gathered.
- It is important for the facilitator to realise that what needs to be covered in the individual workshop should be carefully selected, based on the identified needs coming out of the pre-workshop diagnosis.
- Study the module before the workshop so that you are reasonably comfortable with its content.
- Time must be set aside for practical exercises to determine whether the unit outcomes have been reached.
- · Participants need to complete the Evaluation Forms at the end of the whole module

# 3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

- Training Module on Women Managers and Leaders and the Law
- · Paper and pens
- · Flip charts
- Marking pens (different colours)
- Prestik/Tape/Pins



# **SEATING ARRANGEMENT**

A round table-type of arrangement or a boardroom-type of arrangement with movable furniture components for small group sessions is desirable.

# NUMBER OF PARTICIPANTS

It is ideal to keep the numbers small, i.e. 15 at most, in order to create space for interaction with the group as well as self-analysis.

# 4. PRACTICAL ACTIVITIES

The purpose of the practical exercises in the module is to allow participants to:

- · Learn by doing.
- Learn by experimenting.
- Learn by being allowed to make mistakes.

This means that participants will be allowed to reflect upon their experiences, conceptualise the effect of the experience and be able to take out some lesson to enhance learning.

# 5. BEFORE YOU BEGIN

Bear in mind that:

- The needs of the participants should direct your facilitation. Therefore, do not impose your views on the participants.
- Be caring, and committed to improving and transforming the participants' views.
- Make an effort to ensure that participants trust their own ability to learn. Make their knowledge and experience important for the learning process.

# **SOURCES OF REFERENCE**

Familiarise yourself with the following sources in preparation for the workshop:

# **INTERNATIONAL COMMITMENTS:**

- The Beijing Platform of Action: South Africa's First progress Report
- National Institute for Public Law and Research (NIPILAR)
- · CEDAW Training manual

# **ACTS**

- South African Schools Act 84/96
- National Education Policy Act 27/96
- Employment of Educators Act 76/98
- Employment Equity Act 55/99
- Labour Relations Act 66/95
- Basic Conditions of Employment Act, 1998
- National Norms and Standards for School Funding Notice No. 2362 of 1998
- · Occupational Health and Safety Act
- Skills Development Act
- Skills Development Levies Act
- Child Care Act



# **POLICIES AND DOCUMENTS**

- Language in Education Policy
- · Religious Policy of DoE
- Gender Equality in Education
- · Gender Equity Task Team (GETT) Report
- Values in Education

# **DEALING WITH UNIT OUTCOMES**

- At the beginning of each unit, highlight the unit outcomes.
- On a flip chart, place the unit outcomes where the participants can see them.
- At the end of the unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

# 6. SUGGESTED TIME FRAMES

- Depending on the identified themes developed from the participants' needs, each unit will take at least a day.
- This module has four units. The module is highly legalistic. Therefore, in cases of participants who have limited understanding of the legal environment in education, a two-day workshop is recommended.

# 7. PRACTICAL ACTIVITIES

- Emphasise the importance of linking this module with own experiences
- Encourage participants to contribute actively and critically.
- Balance facilitator input with participant involvement.

# 8. ALLOCATION OF TIME

- This depends on the themes/units to be covered.
- · Plan for at least 3 hours per unit.
- Use your judgment on what is to be emphasised, based on the identified needs.

### 9. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training.

The follow-up will be done through questionnaires.

# 10. PREFACE TO THE MODULE

Spend some time teasing out the underlying assumptions to yourself because these constitute the philosophy on which the content is based.

This module departs from the premise that leadership and management in education does not happen in a vacuum. To be a good leader and manager requires a fair degree of familiarity with the legal environment in which women managers and leaders find themselves. As such women in and into management and leadership positions specifically need to be abreast of the legal framework within which they operate.



Make sure that participants understand and know the full names of policies or pieces of legislation before using acronyms, and in cases of similar acronyms, ensure that the full name is used. Please take note that the list of acronyms given on Page 1 of the training module is not exhaustive. So, do anticipate questions relating to those not included in the list.

# 11. BROAD AIMS OF THE MODULE

The training materials are designed around OBE principles, and due to the specificity of the outcomes, they are covered at unit level.

Before highlighting unit module aims, ask participants what they would like to get out of the workshop. This sets a tone that encourages participant involvement right from the beginning.

Put these up on the flip chart. This will be handy for determining whether the workshop, overall, was successful.

# 12. DEALING WITH PARTICIPANT EXPECTATIONS THAT ARE NOT IN LINE WITH WHAT THE WORKSHOP IS MEANT TO COVER

- · Receive each participant's input without censoring it, in order to send a message that what the participants have to say is important.
- · Record the input again without censoring it.
- Once all of the participants have spoken, go over the list one by one.
- Indicate when a particular expectation is not in line with the workshop outcomes.
- · Park the list of expected outcomes for revisiting as part of the conclusion, when you will be checking whether participants feel that the outcomes were attained.

# 13. THE STRUCTURE OF THE FACILITATOR'S NOTES

- · Note that the nature of this module is such that background information on the international commitments on women issues and on the national legal framework and the related Acts is given to the participants.
- Therefore, most of the information to be imparted is in the manual. The Facilitator's Guide only adds to the information contained in the training manual that deserves further elaboration.
- Please note that only the relevant sections of the training manual are highlighted in the facilitator's guide.
- · Give attention to those areas in your training manual where facilitator's input is indicated.



# **UNIT 1:**

# INTERNATIONAL AND REGIONAL COMMITMENTS TO GENDER EQUALITY AS TOOLS FOR WOMEN (p. 3)

# **FACILITATOR'S INPUT**

# **UNIT OUTCOMES:**

- Take the participants through the unit outcomes.
- Invite the participants to contribute any other outcome if they wish.
- List these on a flip chart.
- Deal with participant's expectations that will not be covered in this module by referring them to other modules or indicating up front that those expectations are not dealt with in this training package.

# **FACILITATION PROCESS**

- Solicit answers and draw comments.
- Give all participants a chance.
- Remember that there are correct answers in some cases and in other instances the answers given in the Facilitator's Guide are merely examples.
- Use your own judgement to evaluate participant input for appropriateness.
- Summarise the discussion and write key points on a flip chart.

### DISCUSSION

Consider the progress made in post-apartheid South Africa to advance the interests of women in the workplace.

Invite participants to share their views about progress made in post-apartheid South Africa to advance the interests of women in the workplace. Record their input on the flip chart and place it where it will be visible. Whenever the opportunity presents itself, refer to this input.

# INTERNATIONAL LABOUR STANDARDS (p. 4)

(i) Beijing Platform for Action (pp. 27-30 below and p. 4 of the Training Manual)
Take the participants through the different platforms for action.

# Women and Poverty:

The aim is to ensure that poverty eradication programmes reach marginalised rural women. Promotes a developmental approach to poverty eradication.

### Women and Education:

Promotes equal access to schooling. Discourages the perpetuation of gender discrimination within the SA education system. Raising the plight of rural and farm schools.



#### Women and Health:

Highlight the impact of HIV/AIDS on women. Seeks to address unequal power relations in respect of HIV/AIDS treatment and awareness.

# Gender-based Violence (violence against women):

The continuous high incidence of violence against women and children causes great concern.

#### Women and Peace:

The impact of armed conflict in Southern Africa, e.g. DRC.

# Women and the Economy:

The increasing job losses impact on women as household heads, especially in rural areas.

# Women and decision-making:

Representation of women in management and leadership positions, especially within the private sector, needs improvement.

- Institutional Mechanisms
- Women's Human Rights
- Women and the Media
- · Women and the Environment
- The Girl-Child

# **FACILITATION PROCESS**

- Familiarise yourself with the issues in Annexure 1.
- Tease comments from participants on these statements.
- Prompt discussion around each issue to ensure that the participants understand and can relate to the actions.

# (ii) Convention on the Elimination of all Forms of Discrimination against Women (p. 5)

- Familiarise yourself with the following CEDAW articles before the workshop.
- During the workshop, take the participants through the different articles of CEDAW.

ARTICLES	DESCRIPTION OF THE ARTICLE
Discrimination	Discrimination against women means treating women and men differently in any way if this different treatment prevents women from exercising their rights and fundamental freedoms.
Policy measures	The SA State condemns all forms of discrimination against women and will take policy measures to ensure that discrimination stops.
Guarantee of Basic Human Rights and Fundamental Freedoms	The State must use all possible measures to improve the position of women in all aspects of their lives.



different articles of CEDAW continued...

ARTICLES	DESCRIPTION OF THE ARTICLE
Affirmative Action	The state may give preference in treatment regarding employment, education, housing and other areas in order to correct the effects caused by previous marginalisation of women.
Sex role attitudes and prejudice	The State must take measures to correct the view that women are less important than men.  The State should encourage an understanding of the importance of both women and men in society.
Prostitution (sex commercial work)	The State must make sure that women are not treated like objects that can be bought and sold.  The State must make sure that women are not exploited as sex workers.
Equality in politics and government	The State must make sure that women and men are treated as equals in politics and in the government of the country.
Participation in international affairs	The State must make sure that women and men have equal rights to represent their country in other countries and take part in the work of international organisations.
Citizenship	The State must give women and men equal rights in citizenship.
Education	The State must make sure that there is no discrimination against women and girls in education.  The State must make sure that women and girls have equal rights as men and boys in education.
Employment	The State must remove discrimination against women in the workplace.
Health care and family planning	The State must take steps to make sure that there are enough health care services and family planning programmes.
Economic and social benefits.	The State must make sure there is social and economic equality between women and men in respect of:  Family benefits  Bank loans, mortgages and other forms of credit Recreational activities, sport and cultural life.
Special help for rural women	The State must take steps to help rural women with special problems they have.
Law	The law must treat women and men equally.
Gender-based violence	To empower women to be aware of their rights when in a gender-based violent environment.

#### **FACILITATION PROCESS**

- Ask participants to relate the articles to their situation and tease comments from them on these articles.
- Let the group reflect on their experience relating to the articles and summarise lessons derived from this learning.
- Record the lessons on the flip chart.

# REGIONAL INITIATIVES ON GENDER EQUALITY (SADC)

# **FACILITATION PROCESS**

- Study and familiarise yourself with Annexure 2. (pp. 31-34 below and p. 5 of the Training Manual).
- Identify main issues that you can share with the group.
- Help the participants to test the implication of the SADC commitments to gender by asking them questions around the identified issues.
- Let the participants comment on your inputs.
- Summarise and record on the flip chart.

#### **EXERCISE** (p. 5)

- Divide the participants into small groups.
- Explain to the groups that the issues reflected on the sheet are from both the Beijing Platform for Action and CEDAW (only articles considered relevant for education were selected).
- Encourage the participants to think about your inputs and invite them to add to the list of issues already provided for in the exercise.
- The small groups must:
  - Identify incidents in their education environment that can be protected by or to which the Platform for Action and CEDAW articles can be applied
  - Give feedback to the plenary session after completing the exercise.
  - Reflect upon the groups' feedback.
  - Summarise and distil lessons for recording.



# UNIT 2:

# NATIONAL CONTEXT FOR WOMEN IN MANAGEMENT AND LEADERSHIP (p. 7)

#### **FACILITATOR'S INPUT**

#### **UNIT OUTCOMES:**

- Take the participants through the unit outcomes.
- Invite the participants to contribute any other outcome if they wish.
- List these on the flip chart.
- · Revisit the unit outcomes at the end of the unit

#### **FACILITATION PROCESS**

# The South African Constitution (pp. 35-42 below and p. 7 of the Training Manual)

Before giving explanations, ask the group the following questions to help the participants think through issues related to this unit:

- What is democracy?
- How will the State ensure that democracy prevails?
- What is a constitution?

Record input on the flip chart and use this as a background to this unit.

#### **EXPLANATORY NOTE**

# RIGHTS OF WOMEN MANAGERS AND LEADERS (p. 7)

# Fundamental Rights and Freedoms (p. 8)

Provide information about the fundamental rights and freedoms as guaranteed by the Constitution, i.e. refer to:

- Right to equality: The right to equality before the law and equal protection of the law.
- Human dignity: Women managers and leaders should treat their subordinates, learners and their parents with dignity and respect.
- Privacy
- · Assembly, demonstrations and petitions
- Freedom of association
- · Political rights
- · Access to information
- Administrative justice
- · Employee rights
- · The environment
- · Children's rights
- Language and culture
- **Education:** The right to basic education and equal access to educational institutions. Instruction in the language of choice. Establishment of institutions based on common culture, language and religion.



# EXERCISE (p. 8)

# **FUNDAMENTAL RIGHTS AND FREEDOMS**

Think about fundamental rights and freedoms presented below and think about ways in which they can be violated and ways in which they can be protected.

These are just examples and participants may give their own examples. In cases of questionable example seek the group opinion about the appropriateness of a given examples.

RIGHT/FREEDOM	WAYS TO PROTECT IT
Right to equality	Treat all learners or employees the same
Human dignity	Treat learners with respect and be considerate
Privacy	Respect confidentiality
Assembly, demonstration and petitions	Grant learners/educators the right to demonstrate if their demonstration is legal
Freedom of association	Allow subordinates to exercise their right to affiliate
Political rights	Exercise impartiality when dealing with staff matters
Access to information	Share and disseminate information as a matter of course
Education	Use detention after school to deal with minor infringements
Administrative justice	In dealing with infringements by both learners and educators, follow due process
Safe environment	Ensure that the physical environment poses no danger to both the learners and staff
Labour relations	Respect employees and follow due process in addressing issues such as disciplinary or grievance issues
Freedom from abuse/premature labour involvement	Report cases of child abuse and child labour
Language and culture	Arrange for an interpreter in cases of discussion with parents who do not speak English



#### NATIONAL MACHINERY ON THE ADVANCEMENT OF WOMEN

# (i) Commission on Gender Equality

The Commission on Gender Equality (CGE) is governed and mandated by the Commission on Gender Equality Act No 39 of 1996. Within its powers and functions, the CGE aims at assisting women managers and leaders in relation to:

- Providing gender equality information and education.
- Intervention strategies.
- · Research on gender issues.
- · Monitor and evaluate progress made in gender equality.

# **FACILITATION PROCESS**

- Divide the participants into small groups.
- After the exercise let the groups give feedback to the plenary session.
- Ensure that there is group responsibility and commitment.

# EXERCISE (p. 9)

# Possible Answers on Information from CGE (p.9)

List the type of information you can get from the CGE. State how this information can be used in your role.

Research reports, e.g. Gender and the Private Sector- GAPS.

Gender policies and procedures of various organisations, government departments and civil society organisations.

Parliamentary initiatives, projects and programmes on gender equality.

International conventions and monitoring reports.



# **EXERCISE** (p. 11)

# Possible Answer - Gender Focal Points: (p.10)

Think about the role of the Gender Focal Point in education at national and provincial level.

- 1. List what the GFP has done to date.
- 2. List what it ought to do.
- 3. Suggest what it might do to enhance your position.

WHAT GFP HAS DONE	WHAT GFP OUGHT TO DO	OTHER WAYS GFP CAN ENHANCE THE POSITION OF WOMEN MANAGERS IN EDUCATION
In the process of assisting the Departments to integrate gender into policies.	Assist the department in integrating gender into its policies and programmes.	Education will have policies and programmes targeting women and aiming to address issues of inequality.
Have to some extent created awareness but rarely reaches marginalised rural areas.	Arrange for awareness creation and training on gender issues within education.	Will enhance understanding of practical as well as strategic needs of women within the department.  Will create a climate conducive to the empowerment of women.
Not quite clear about the extent to which the GFP is liaising with NGO's, private sector, etc. and what the outcome of such interaction is.	Consult and liaise with NGOs, private sector and civil society on gender-related education issues.	Form strategic alliances and partnerships with counterparts.

# **FACILITATOR'S NOTES**

What the Gender Focal Points have done already can only be answered through the participants' experience of what they feel and observe as having an impact on them in their provinces. Hence the above are possible answers only.

# **UNIT 3:**

# GENERIC LEGISLATION AFFECTING THE ROLE OF WOMEN MANAGERS AND LEADERS IN EDUCATION (p. 11)

#### **FACILITATOR'S INPUT**

#### **UNIT OUTCOMES:**

Begin by discussing unit outcomes and record them on a flip chart. Lead a discussion on the question of legal rights, highlighting that legal rights are guaranteed by law and as such, the woman manager has an obligation to exercise due care in executing her managerial and legal duties. Emphasise that it becomes crucial for a woman manager to:

- Clearly understand the scope of her mandate
- If the mandate falls outside the scope of normal line function, ensure that delegation is in writing
- Understand the limits of her mandate.
- Understand when and how to refer matters higher up.
- Avoid conflict often brought about by exceeding the scope of one's mandate.

IN DOING SO IT IS CRUCIAL THAT A WOMAN MANGER IN EDUCATION INTERNALISES THE FOLLOWING CONCEPTS:		
Procedures	The way things are done: How to do things.	I ensure that educators in my school follow the right procedures, especially according to the norms and standards regulating financial management in education.
Regulations	The laws that regulate education, e.g. SASA, NEPA, etc.	The running of our school is governed by the requirements of several Acts in education.
Control	As a woman manager, I have control over the use of school funds.	Check if every teacher records all monies received from learners for the school fund.
Consistency	Application of school regulations in a uniform manner.	School rules and regulations apply to all educators in a similar manner.

# EXERCISE (p. 11)

# **EXAMPLES OF BEHAVIOURS REGULATED BY COMMON LAW**

Doctrine of common purpose, e.g. should a woman manager find herself as part of a group of educators who haul abuse at district officials, although there may not be evidence of her direct role in that her mere presence in the that mob makes her equally responsible for the consequences of the actions of the mob.

Regardless of what has happened, common law dictates that bodily integrity of fellow human beings shall be respected – hence the ban on corporal punishment. Beating up/assault of fellow educators is therefore an offense.

Invite participants to give their own examples.

# EXERCISE (p. 13)

CHILDREN'S RIGHT	WHAT I NEED TO DO TO PROTECT THIS RIGHT
EDUCATION	I cannot expel a learner from school for failing to pay school fees I cannot inflict punishment that prevents the learner from class attendance
Freedom from discrimination	I cannot treat learners differently, for instance, because of their religion
Name and nationality	I have a responsibility to ascertain and respect the names and nationalities of my learners
Right to opinion and participation	In matters pertaining to learners I have to solicit the opinions of learners through the Learner Representative Council
Freedom of beliefs and culture	The right of all my learners to their beliefs and culture should be respected by not imposing any religious or cultural practice on them
Protection from violence	I have a responsibility as a woman manager to protect my learners from all forms of harassment
Family life	In the interest of family life I have a responsibility to admit learners even half way through the year
Health and welfare	I have a responsibility to report to social service agencies all observed forms of abuse and neglect
Child labour	I have a responsibility to report all instances of child labour that I become aware of
Homeless children	I cannot force a child to return home if abuse is going to continue



# CASE STUDY (p. 15)

#### **FACILITATION PROCESS:**

Divide participants into small groups and let them identify the problem and generate group solution

# POSSIBLE ANSWER TO CASE STUDY

#### THE APPLICANT MUST UNDERSTAND THE FOLLOWING:

# Every choice leads to opportunity or loss. Based on this, he must realise that:

- (a) By choosing a district official position he has forfeited the privileges that govern school-based position. This is something that he ought to have verified before accepting the district-based position.
- (b) As a district official, the employment conditions that apply are those covered in the PSA and not the E of EA
- (c) Unless the district manager motivates otherwise, the newly appointed district official is subject to a probation period of 12 months during which he has to serve the district.

The request for study leave immediately after assumption of duty is therefore not a reasonable request.

In order not to be in violation of the PSA, and to avoid creating a precedent, this request for study leave should be declined.

Do you think such a request should be favourably considered, and why?



# **UNIT 4:**

# **LEGISLATION REGULATING THE EDUCATION ENVIRONMENT** (p. 15)

# **FACILITATOR'S INPUT**

## **UNIT OUTCOMES:**

Begin by discussing unit outcomes and record them on a flip chart. Lead a discussion by asking participants to give you all pieces of legislation that regulate the education environment. Record this on a flip chart separating legislation that relates directly to education in relation to other pieces of legislation.

#### **EXPLANATORY NOTE:**

Indicate that the legal environment in which education operates, occurs within the broader environment that is legislated in terms of issues like employee relations. The challenge for women managers in education is to integrate these in a manager that makes sense.

- Refer to the South African Schools Act (SASA) section to reinforce what the governing body of a school is mandated to do (p. 16).
- Focus on what the woman manager and leader will do, such as:
  - Facilitating the establishment of the governing body.
  - Helping the governing body members to understand their role and how SASA regulates their activities
  - Facilitating that the capacity of the governing body be built through introducing appropriate programmes or linking them up with networks and other resources

# **FACILITATOR'S NOTES**

# WOMEN MANAGERS AND LEADERS AND BASIC FINANCIAL MANAGEMENT IN EDUCATION (p. 16)

- Draw from the notes derived from the Resource Management Module in Annexure 4.
- Use the following notes to inform participants of their responsibilities in respect of school funds and finances.
- Remind the groups to think of their role as financial managers at schools or offices and let them answer the following questions:

LAW BEING VIOLATED	PROCEDURE BEING VIOLATED	ACCOUNTING OFFICER RESPONSIBLE
SASA, PFMA	Procurement Policy and procedure	District Manager
SASA		District Manager/Principal who may not have nagged the district office enough
Constitution		



# SELF MANAGEMENT

#### CASE STUDY

Police found hundreds of boxes of stationery and exercise books on a farm. Some of these boxes had been lying there for six months and were eaten by termite. The contractor who was supposed to have delivered the books at school had instead packed them in makeshift storerooms on his disused farm.

Not a single education official had realised that learner support materials bought with public funds were unaccounted for. It took a squad of policemen on a routine mission to accidentally make this discovery. "This is a major indictment on the auditing procedures in our schools system" reported the Sunday Times of January 20 2002.

Identify laws and procedures that are being violated by the events in this case study as well as accounting officers who have to be brought to book for these violations.

### **FACILITATOR'S NOTES**

In identifying the specific responsible accounting officer/s ask the following questions:

- Who identified the need for the stationery and the exercise books at school level?
- Who placed an order to purchase the items?
- Describe the route that this order followed or should have followed until the stationery and books were in the hands of the distributor.
- What should happen after the distributor has received the goods. In your opinion what should have happened to avoid this incident?

## EXERCISE (p. 18)

List activities that you engage in in the course of executing your duties as a woman manager. Identify the relevant piece/pieces of legislation that regulate such activities.

#### **FACILITATION PROCESS**

These are just examples and the list is endless. Invite the participants to make input and record on a flipchart.

ACTIVITIES	RELEVANT LEGISLATION
Processing of maternity leave applications	BCEA
Admission of learners	SASA
Ensuring a safe environment	OHSA
Filling vacant positions	SASA/Employment of Educator's Act
Dealing with non paying learners	SASA



# EXERCISE (p. 21)

#### **FACILITATOR'S NOTES**

- Facilitate discussion around the previous case study involving Mrs X. State what type of discrimination relates to her circumstances?
- Which legal recourse does she have in relation to the type of discrimination?
- Relate her possible action to the stated Acts that could help strengthen her case.
- Discrimination based on Mrs. X's reproductive functions: The SGB's assertion that Mrs X's maternity leave is an indication that she is not committed to her work is proof of such discrimination. If the assertion was done in writing, Mrs X has a strong case against the school and the department. If the assertion was verbal, Mrs X needs witnesses to make her case stronger.
- Mrs X needs to familiarise herself with the definition of unfair discrimination, Employment Equity Act, Section 6 (1) in order to understand what her grievance is based on. She should also examine the grievance procedures governing disputes within the Department of Education.
- Where she is convinced that she has a strong case, Mrs X can then take the following steps:
- She could write a letter to the SGB and Mrs Khumalo, stating she has been discriminated against and intends to lodge a grievance based on this.
- She can quote the relevant Acts in support of her allegations.
- The letter should be copied to the District or Regional manager of education, to the provincial department and to the national office.
- The letter should state by when she expects a response, where the SGB and Mrs Khumalo would answer in their defence.
- Failing to get their response, another letter should be written to the district office, this time sending copies to Mrs Khumalo and the SGB in addition to the offices already copied to the first time.
- Exhaust all avenues, whilst keeping records before taking a legal recourse. Mrs X can consult a legal representative for this process.

#### **FACILITATION PROCESS**

- Take the participants through the relevant section of the Education Employment Act 7(1) as provided in the Training Manual.
- Encourage the participants to cite any known examples in order to enhance learning.



# POLICIES APPLICABLE TO THE FIELD OF EDUCATION

# **FACILITATION PROCESS**

Ask participants to indicate why there should be policies regulating the education environment.

Record their input on flip chart and steer the discussion to the direction that policies give effect to the various pieces of legislation, e.g. the Constitution guarantees language rights and the DoE language policy puts into effect this Constitutional provision:

- Start the session by asking the participants to define what values are.
- Test whether they have insight into education values by asking them to define the following, using the grid below:

VALUES	DEFINITION
Equity	Fairness. Recourse to principles of justice
Tolerance	Willingness to endure. Forbear other people's behaviour and practices
Multi-lingualism	Use of many languages
Openness	Honesty without barrier
Accountability	Bound to explain one's behaviour or actions to others
Social honour	Allegiance to what is socially acceptable

• Facilitate discussion around the following values embedded in the Constitution.

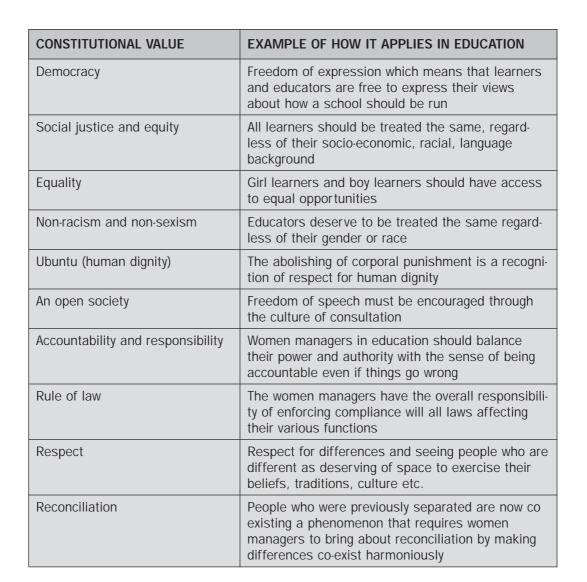
# **EDUCATION VALUES**

Constitutional values are given in the first column. Indicate by giving concrete examples of how these values manifest themselves in a school situation.

#### **FACILITATION PROCESS**

Invite participants to cite their own example and tease out the input for appropriateness.





#### **EXERCISE** (p. 24)

# **CASE STUDY**

Three hundred pupils found out the hard way just how serious their principal is about creating a culture of learning. She shocked them when they were late for school. The principal of Thutong High School in Mothibestad took this drastic step on the second day of a school year to lock the school gates just twenty minutes after the official beginning of a school day. Late learners were ordered to go back home The principal who has headed the school for twenty years is unfazed by criticism arguing that there is no reason why learners who are serious about their education should be late for school. She argued "We are doing this for their own good, we want them to embrace the culture of learning and we are not going to tolerate any disturbances. Late coming learners have no regard for time and they do not appreciate the value of education. They must know we mean business".



#### IN SMALL GROUPS DISCUSS THE PRINCIPAL'S ACTIONS AND CONSIDER:

Whether such action promotes values that the schools should uphold and whether such actions contribute to the promotion of the culture of teaching and learning in the short-term and long-term?

What actions would you take under the same circumstances?

What actions are appropriate for entrenching value of timeliness in schools?

- The actions of the principal are clearly unconstitutional as they deprive the learners of their right to learn.
- Use other mechanisms to discourage learners from arriving late, e.g. detention after 3 demerits for arriving late.
- Set up a system to reward those who come on time, e.g. a merit system.
- Discuss the importance of coming early with the Parent Teacher Association.
- If there is a newsletter, write an article, etc.

# EXERCISE (p. 26)

What does the DoE language policy mean for you as a woman manager in education in context of integrated schools both from the perspective of educators and learners. How would you apply such a policy in determining what second language is to be offered in your school.

- Refer to the importance of constituting a committee to deal with the matter.
- Survey parents.
- Let the majority preference prevail, considering financial constraints.

#### 14. COMPLETION OF THE DOE WORKSHOP EVALUATION FORMS

All participants must complete these forms. Make an announcement at the very beginning and indicate that those participants who will leave early, for whatever reason, still need to complete these forms.

# 15. CONCLUSION: WERE THE WORKSHOP OUTCOMES ATTAINED?

- Revisit the flip chart where the intended workshop outcomes were written.
- Go over the outcomes one by one.
- Ascertain whether the participants believe the outcomes were achieved.
- If most of the outcomes were achieved, well done!
- If most of the outcomes were not achieved, you as a facilitator need to practice steering the ship in the right direction.
- Include this in the process report.



# **A**NNEXURE 1:

Beijing Declaration and Platform for Action, Fourth World Conference on Women, 15 September 1995, A/CONF.177/20 (1995) and /CONF.177/20/Add.1 (1995).

#### PLATFORM FOR ACTION:

22. The implementation of the Platform for Action requires commitment from Governments and the international community. By making national and international commitments for action, including those made at the Conference, Governments and the international community recognise the need to take priority action for the empowerment and advancement of women.

#### WE ARE DETERMINED TO:

- 23. Intensify efforts and actions to achieve the goals of the Nairobi Forward-looking Strategies for the Advancement of Women by the end of this century;
- 24. Ensure the full enjoyment by women and the girl child of all human rights and fundamental freedoms, and take effective action against violations of these rights and freedoms;
- 25. Take all necessary measures to eliminate all forms of discrimination against women and the girl child and remove all obstacles to gender equality and the advancement and empowerment of women;
- 26. Encourage men to participate fully in all actions towards equality;
- 27. Promote women's economic independence, including employment, and eradicate the persistent and increasing burden of poverty on women by addressing the structural causes of poverty through changes in economic structures, ensuring equal access for all women, including those in rural areas, as vital development agents, to productive resources, opportunities and public services;
- 28. Promote people-centred sustainable development, including sustained economic growth through the provision of basic education, life-long education, literacy and training, and primary health care for girls and women;
- 29. Take positive steps to ensure peace for the advancement of women and, recognising the leading role that women have played in the peace movement, work actively towards general and complete disarmament under strict and effective international control, and support negotiations on the conclusion, without delay, of a universal and multilaterally and effectively verifiable comprehensive nuclear-test-ban treaty which contributes to nuclear disarmament and the prevention of the proliferation of nuclear weapons in all its aspects;
- 30. Prevent and eliminate all forms of violence against women and girls;



**SELF MANAGEMENT** 

- 31. Ensure equal access to and equal treatment of women and men in education and health care and enhance women's sexual and reproductive health as well as education;
- 32. Promote and protect all human rights of women and girls;
- 33. Intensify efforts to ensure equal enjoyment of all human rights and fundamental freedoms for all women and girls who face multiple barriers to their empowerment and advancement because of such factors as their race, age, language, ethnicity, culture, religion, or disability, or because they are indigenous people;
- 34. Ensure respect for international law, including humanitarian law, in order to protect women and girls in particular;
- 35. Develop the fullest potential of girls and women of all ages, ensure their full and equal participation in building a better world for all and enhance their role in the development process.

#### WE ARE DETERMINED TO:

- 36. Ensure women's equal access to economic resources including land, credit, science and technology, vocational training, information, communication and markets, as a means to further the advancement and empowerment of women and girls, including through the enhancement of their capacities to enjoy the benefits of equal access to these resources, inter alia, by means of international co-operation;
- 37. Ensure the success of the Platform for Action which will require a strong commitment on the part of Governments, international organisations and institutions at all levels. We are deeply convinced that economic development, social development and environmental protection are interdependent and mutually reinforcing components of sustainable development, which is the framework for our efforts to achieve a higher quality of life for all people. Equitable social development that recognises empowering the poor, particularly women living in poverty, to utilise environmental resources sustainably is a necessary foundation for sustainable development. We also recognise that broad-based and sustained economic growth in the context of sustainable development is necessary to sustain social development and social justice. The success of the Platform for Action will also require adequate mobilisation of resources at the national and international levels as well as new and additional resources to the developing countries from all available funding mechanisms, including multilateral, bilateral and private sources for the advancement of women; financial resources to strengthen the capacity of national, sub-regional, regional and international institutions; a commitment to equal rights, equal responsibilities and equal opportunities and to the equal participation of women and men in all national, regional and international bodies and policy-making processes; the establishment or strengthening of mechanisms at all levels for accountability to the world's women;
- 38. Ensure also the success of the Platform for Action in countries with economies in transition, which will require continued international co-operation and assistance;

- 39. We hereby adopt and commit ourselves as Governments to implement the following Platform for Action, ensuring that a gender perspective is reflected in all our policies and programmes. We urge the United Nations system, regional and international financial institutions, other relevant regional and international institutions and all women and men, as well as non-governmental organisations, with full respect for their autonomy, and all sectors of civil society, in co-operation with Governments, to fully commit themselves and contribute to the implementation of this Platform for Action.
- 40. The advancement of women and the achievement of equality between women and men are a matter of human rights and a condition for social justice and should not be seen in isolation as a women's issue. They are the only way to build a sustainable, just and developed society. Empowerment of women and equality between women and men are prerequisites for achieving political, social, economic, cultural and environmental security among all peoples.
- 41. Most of the goals set out in the Nairobi Forward-looking Strategies for the Advancement of Women have not been achieved. Barriers to women's empowerment remain, despite the efforts of Governments, as well as non-governmental organisations and women and men everywhere. Vast political, economic and ecological crises persist in many parts of the world. Among them are wars of aggression, armed conflicts, colonial or other forms of alien domination or foreign occupation, civil wars and terrorism. These situations, combined with systematic or de facto discrimination, violations of and failure to protect all human rights and fundamental freedoms of all women, and their civil, cultural, economic, political and social rights, including the right to development and ingrained prejudicial attitudes towards women and girls are but a few of the impediments encountered since the World Conference to Review and Appraise the Achievements of the United Nations Decade for Women: Equality, Development and Peace, in 1985.
- 42. A review of progress since the Nairobi Conference highlights special concerns areas of particular urgency that stand out as priorities for action. All actors should focus action and resources on the strategic objectives relating to the critical areas of concern, which are, necessarily, interrelated, interdependent and of high priority. There is a need for these actors to develop and implement mechanisms of accountability for all the areas of concern.
- 43. To this end, Governments, the international community and civil society, including non-governmental organisations and the private sector, are called upon to take strategic action in the following critical areas of concern:
  - The persistent and increasing burden of poverty on women
  - Inequalities and inadequacies in and unequal access to education and training
  - Inequalities and inadequacies in and unequal access to health care and related services
  - Violence against women
  - The effects of armed or other kinds of conflict on women, including those living under foreign occupation



- Inequality in economic structures and policies, in all forms of productive activities and in access to resources
- Inequality between men and women in the sharing of power and decision-making at all levels
- Insufficient mechanisms at all levels to promote the advancement of women
- Lack of respect for and inadequate promotion and protection of the human rights of women
- Stereotyping of women and inequality in women's access to and participation in all communication systems, especially in the media
- Gender inequalities in the management of natural resources and in the safeguarding of the environment
- Persistent discrimination against and violation of the rights of the girl child.



# **ANNEXURE 2**:

Southern African Development Community, (SADC) Gender Policy Framework

The Policy and Institutional Framework for Gender in the SADC

#### 1. FORMAL ADOPTION

At their meeting held in Windhoek in February 1997, the SADC Council of Ministers approved the establishment of a policy framework for mainstreaming gender in all SADC activities, and for strengthening the efforts by member countries to achieve gender equality.

In addition, the Council approved an institutional framework for advancing gender equality consistent with that established for other areas of co-operation, but which ensures that gender is routinely taken into account in all sectors. The institutional framework has four components.

First, a Standing Committee of Ministers responsible for Gender Affairs in the region is established.

Secondly, it adopts the existing Advisory Committee, which consists of one government and one NGO representative from each SADC Member State, whose task is to advise the Standing Committee of Ministers and other Sectoral Committees of Ministers on gender issues.

Thirdly, Gender Focal Points at the sectoral level are established, whose task would be to ensure that gender is taken into account in all-sectoral initiatives, and is placed on the agenda of all ministerial meetings.

Finally, the framework establishes a Gender Unit in the SADC Secretariat.

Significant progress has been made since the institutional framework was formally adopted. SADC Ministers responsible for Gender Affairs held their annual meetings in 1997 and 1998, and a number of other important developments have also taken place.

#### 2. THE SADC DECLARATION ON GENDER AND DEVELOPMENT

On September 8, 1997, SADC Heads of State or Government signed the Declaration on Gender and Development in which they make the following commitments, among others:

- The achievement of at least 30% target of women in political and decision making structures by 2005;
- Promoting women's full access to, and control over productive resources to reduce the level of poverty among women;
- Repealing and reforming all laws, amending constitutions and changing social practices which still subject women to discrimination;
- Taking urgent measures to prevent and deal with the increasing levels of violence against women and children.



# a. The Prevention and Eradication of Violence Against Women and Children: An Addendum to the Gender and Development Declaration

In implementation of the above commitments, SADC Heads of State or Government signed an Addendum to the 1997 SADC Declaration on Gender and Development which is entitled 'The Prevention and Eradication of Violence Against Women and Children', in 1998. This addendum contains the following elements:

- A recognition that violence against women and children is a violation of fundamental human rights;
- An identification of the various forms of violence against women and children in SADC;
- A concern that the various forms of violence against women and children in SADC continue to increase, and a recognition that existing measures are inadequate;
- Recommendations for the adoption of the measures in the following areas, among others;
  - Enactment of legislation and legally binding SADC instruments;
  - Social, economic, cultural, and political interventions;
  - Service delivery;
  - Education, training and awareness programmes;
  - Integrated approaches; and
  - Budgetary allocations.

#### b. Establishment of the SADC Gender Unit

The SADC Gender Unit was established at the Secretariat in June 1998, and is staffed by two senior officers. The overall function of the Gender Unit is to advise all SADC structures on gender issues, and work with other officers in the SADC Secretariat to ensure that a gender perspective permeates the entire SADC Programme of Action and Community Building Initiative.

The specific tasks of the gender unit include, among others, the development of an overall gender strategy and policy framework for SADC, as well as monitoring the implementation of the 1997 Declaration of SADC Heads of State on Gender and Development.

The role of the Gender Unit is therefore to advise, co-ordinate and facilitate the achievement of gender equality in SADC. As such it is not an implementing institution; thus the task of mainstreaming gender into all sectoral activities in the responsibility of the sector co-ordinating units and commissions. The gender unit is there to guide and assist the SCUs and other SADC institutions in this task.

#### 3. THE PLAN OF ACTION FOR GENDER IN SADC

A Plan of Action for Gender in SADC has been in the process of development by SADC structures and stakeholders in gender in the region since 1995. The SADC Ministers responsible finally approved the refined Plan for Gender/Women's Affairs, and the Council of Ministers in July and September 1998 respectively.

#### a. Overall Goal and Objectives of the Plan

The overall goal of the plan is to provide the tools for the achievement of gender equality through the empowerment of women in the SADC region, and the mainstreaming of gender into the SADC Programme of Action and Community Building Initiative.



The principal objectives of the Plan, which reflect the six major areas of concern for the SADC region are as follows:

- To ensure the development of a policy and institutional framework for gender mainstreaming in the policies, programmes and activities of all SADC Member States, in SADC structures and in its programme of action;
- To cultivate and promote a culture of equality between men and women in SADC, respect for the human rights of women, and the elimination of violence against women;
- To facilitate the achievement of gender equality in access to economic structures and control of resources in the SADC region;
- To promote equality between men and women in the sharing of power and ensure the achievement of at least 30% female representation in decision-making structures by the year 2005:
- To monitor and evaluate the implementation of the 1997 SADC Declaration on Gender and Development and the Gender Programme of Action;
- To facilitate the promotion of peace and stability in SADC region and evaluate the impact of war and conflict on the social, economic and psychological development of women and children.

## b. Implementing and focusing the Plan

To implement the above objectives, a number of broad strategies have been identified to be adopted at both national and regional levels. These include Capacity Building and Training, Policy Development, Lobbying and Advocacy, Networking, Research and Information Management, Monitoring and Evaluation, as well as programmes and projects. The Plan further identifies a number of activities to be carried out under each area of concern, as well as the institutions that will carry them out.

The strategies and activities in all areas of the Plan however remain very broad, and may be unrealistic, especially in view of the limited human and financial resources available to the Gender Unit. A need to further prioritise and focus was recognised, if the plan is to be translated into concrete action with tangible results. In recognition of this, the Regional Advisory Committee held a workshop in Windhoek in November 1998, with a view to further prioritising and identifying activities for 1999 – 2000.

The approach adopted at this workshop was that in order for interventions at regional level to be meaningful, what should inform them is already happening in the field of gender and development, both in Member States and in the SADC Programme of Action.

It was therefore agreed that the first year be spent conducting a number of short term studies and analysis of the situation of women and men in SADC, as well as an audit of the policies, programmes and projects of Member States, NGOs, SADC Sector Coordinating Units and Regional Commissions.

Assist the group to relate the participants relate the SADC commitments to their situation and experiences.



# **ANNEXURE 3:**

#### THE SA CONSTITUTION

We, the people of South Africa declare that-

Whereas there is a need to create a new order in which all South Africans will be entitled to a common South African citizenship in a sovereign and democratic constitutional state in which there is equality between men and women and people of all races so that all citizens shall be able to enjoy and exercise their fundamental rights and freedoms;

## 7. APPLICATION

- (1) This Chapter shall bind all legislative and executive organs of state at all levels of government.
- (2) This Chapter shall apply to all law in force and all administrative decisions taken and acts performed during the period of operation of this Constitution.
- (3) Juristic persons shall be entitled to the rights contained in this Chapter where, and to the extent that, the nature of the rights permits.
- (4) a. When an infringement of or threat to any right entrenched in this Chapter is alleged, any person referred to in paragraph (b) shall be entitled to apply to a competent court of law for appropriate relief, which may include a declaration of rights.
  - b. The relief referred to in paragraph (a) may be sought by
    - i. a person acting in his or her own interest;
    - ii. an association acting in the interest of its members;
    - iii. a person acting on behalf of another person who is not in a position to seek such relief in his or her own name;
    - iv. a person acting as a member of or in the interest of a group or class of persons; or
    - v. a person acting in the public interest.

#### 8. EQUALITY

- (1) Every person shall have the right to equality before the law and to equal protection of the law.
- (2) No person shall be unfairly discriminated against, directly or indirectly, and, without derogating from the generality of this provision, on one or more of the following grounds in particular: race, gender, sex, ethnic or social origin, colour, sexual orientation, age, disability, religion, conscience, belief, culture or language.
- (3) a. This section shall not preclude measures designed to achieve the adequate protection and advancement of persons or groups or categories of persons disadvantaged by unfair discrimination, in order to enable their full and equal enjoyment of all rights and freedoms.



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ject to and in accordance with sections 121, 122 and 123.

(4) Prima facie proof of discrimination on any of the grounds specified in subsection (2) shall be presumed to be sufficient proof of unfair discrimination as contemplated in that subsection, until the contrary is established.

#### 9. LIFE

Every person shall have the right to life.

#### 10. HUMAN DIGNITY

Every person shall have the right to respect for and protection of his or her dignity.

### 11. FREEDOM AND SECURITY OF THE PERSON

- (1) Every person shall have the right to freedom and security of the person, which shall include the right not to be detained without trial.
- (2) No person shall be subject to torture of any kind, whether physical, mental or emotional, nor shall any person be subject to cruel, inhuman or degrading treatment or punishment.

#### 12. SERVITUDE AND FORCED LABOUR

No person shall be subject to servitude or forced labour.

### 13. PRIVACY

Every person shall have the right to his or her personal privacy, which shall include the right not to be subject to searches of his or her person, home or property, the seizure of private possessions or the violation of private communications.

# 14. RELIGION, BELIEF AND OPINION

- (1) Every person shall have the right to freedom of conscience, religion, thought, belief and opinion, which shall include academic freedom in institutions of higher learning.
- (2) Without derogating from the generality of subsection (1), religious observances may be conducted at state or state-aided institutions under rules established by an appropriate authority for that purpose, provided that such religious observances are conducted on an equitable basis and attendance at them is free and voluntary.
- (3) Nothing in this Chapter shall preclude legislation recognising
  - a. a system of personal and family law adhered to by persons professing a particular religion; and
  - b. the validity of marriages concluded under a system of religious law subject to specified procedures.



#### 15. FREEDOM OF EXPRESSION

- (1) Every person shall have the right to freedom of speech and expression, which shall include freedom of the press and other media, and the freedom of artistic creativity and scientific research.
- (2) All media financed by or under the control of the state shall be regulated in a manner which ensures impartiality and the expression of a diversity of opinion.

# 16. ASSEMBLY, DEMONSTRATION AND PETITION

Every person shall have the right to assemble and demonstrate with others peacefully and unarmed, and to present petitions.

# 17. FREEDOM OF ASSOCIATION

Every person shall have the right to freedom of association.

#### 18. FREEDOM OF MOVEMENT

Every person shall have the right to freedom of movement anywhere within the national territory.

#### 19. RESIDENCE

Every person shall have the right freely to choose his or her place of residence anywhere in the national territory.

#### 20. CITIZENS' RIGHTS

Every citizen shall have the right to enter, remain in and leave the Republic, and no citizen shall without justification be deprived of his or her citizenship.

#### 21. POLITICAL RIGHTS

- (1) Every citizen shall have the right
  - a. to form, to participate in the activities of and to recruit members for a political party;
  - b. to campaign for a political party or cause; and
  - c. freely to make political choices.
- (2) Every citizen shall have the right to vote, to do so in secret and to stand for election to public office.

#### 22. ACCESS TO COURT

Every person shall have the right to have justifiable disputes settled by a court of law or, where appropriate, another independent and impartial forum.

#### 23. ACCESS TO INFORMATION

Every person shall have the right of access to all information held by the state or any of its organs at any level of government in so far as such information is required for the exercise or protection of any of his or her rights.



### 24. ADMINISTRATIVE JUSTICE

Every person shall have the right to-

- a. lawful administrative action where any of his or her rights or interests is affected or threatened:
- b. procedurally fair administrative action where any of his or her rights or legitimate expectations is affected or threatened;
- c. be furnished with reasons in writing for administrative action which affects any of his or her rights or interests unless the reasons for such action have been made public; and
- d. administrative action which is justifiable in relation to the reasons given for it where any of his or her rights is affected or threatened.

# 25. DETAINED, ARRESTED AND ACCUSED PERSONS

- (1) Every person who is detained, including every sentenced prisoner, shall have the right
  - a. to be informed promptly in a language which he or she understands of the reason for his or her detention;
  - to be detained under conditions consonant with human dignity, which shall include at least the provision of adequate nutrition, reading material and medical treatment at state expense;
  - c. to consult with a legal practitioner of his or her choice, to be informed of this right promptly and, where substantial injustice would otherwise result, to be provided with the services of a legal practitioner by the state;
  - d. to be given the opportunity to communicate with, and to be visited by, his or her spouse or partner, next-of-kin, religious counsellor and a medical practitioner of his or her choice; and
  - e. to challenge the lawfulness of his or her detention in person before a court of law and to be released if such detention is unlawful.
- (2) Every person arrested for the alleged commission of an offense shall, in addition to the rights which he or she has as a detained person, have the right-
  - a. promptly to be informed, in a language which he or she understands, that he
    or she has the right to remain silent and to be warned of the consequences of
    making any statement;
  - b. as soon as it is reasonably possible, but not later than 48 hours after the arrest or, if the said period of 48 hours expires outside ordinary court hours or on a day which is not a court day, the first court day after such expiry, to be brought before an ordinary court of law and to be charged or to be informed of the reason for his or her further detention, failing which he or she shall be entitled to be released;





- c. not to be compelled to make a confession or admission which could be used in evidence against him or her; and
- d. to be released from detention with or without bail, unless the interests of justice require otherwise.
- (3) Every accused person shall have the right to a fair trial, which shall include the right
  - a. to a public trial before an ordinary court of law within a reasonable time after having been charged;
  - b. to be informed with sufficient particularity of the charge;
  - c. to be presumed innocent and to remain silent during plea proceedings or trial and not to testify during trial;
  - d. to adduce and challenge evidence, and not to be a compellable witness against himself or herself;
  - e. to be represented by a legal practitioner of his or her choice or, where substantial injustice would otherwise result, to be provided with legal representation at state expense, and to be informed of these rights;
  - f. not to be convicted of an offense in respect of any act or omission which was not an offense at the time it was committed, and not to be sentenced to a more severe punishment than that which was applicable when the offense was committed:
  - g. not to be tried again for any offense of which he or she has previously been convicted or acquitted;
  - h. to have recourse by way of appeal or review to a higher court than the court of first instance:
  - i. to be tried in a language which he or she understands or, failing this, to have the proceedings interpreted to him or her; and
  - j. to be sentenced within a reasonable time after conviction.

#### 26. ECONOMIC ACTIVITY

- (1) Every person shall have the right freely to engage in economic activity and to pursue a livelihood anywhere in the national territory.
- (2) Subsection (1) shall not preclude measures designed to promote the protection or the improvement of the quality of life, economic growth, human development, social justice, basic conditions of employment, fair labour practices or equal opportunity for all, provided such measures are justifiable in an open and democratic society based on freedom and equality.



#### 27. LABOUR RELATIONS

- (1) Every person shall have the right to fair labour practices.
- (2) Workers shall have the right to form and join trade unions, and employers shall have the right to form and join employers' organisations.
- (3) Workers and employers shall have the right to organise and bargain collectively.
- (4) Workers shall have the right to strike for the purpose of collective bargaining.
- (5) Employers' recourse to the lock-out for the purpose of collective bargaining shall not be impaired, subject to section 33 (1).

#### 28. PROPERTY

- (1) Every person shall have the right to acquire and hold rights in property and, to the extent that the nature of the rights permits, to dispose of such rights.
- (2) No deprivation of any rights in property shall be permitted otherwise than in accordance with a law.
- (3) Where any rights in property are expropriated pursuant to a law referred to in subsection (2), such expropriation shall be permissible for public purposes only and shall be subject to the payment of agreed compensation or, failing agreement, to the payment of such compensation and within such period as may be determined by a court of law as just and equitable, taking into account all relevant factors, including, in the case of the determination of compensation, the use to which the property is being put, the history of its acquisition, its market value, the value of the investments in it by those affected and the interests of those affected.

#### 29. ENVIRONMENT

Every person shall have the right to an environment, which is not detrimental to his or her health or well being.

# 30. CHILDREN

- (1) Every child shall have the right
  - a. to a name and nationality as from birth;
  - b. to parental care;
  - c. to security, basic nutrition and basic health and social services;
  - d. not to be subject to neglect or abuse; and
  - e. not to be subject to exploitative labour practices nor to be required or permitted to perform work which is hazardous or harmful to his or her education, health or well-being.



- (2) Every child who is in detention shall, in addition to the rights which he or she has in terms of section 25, have the right to be detained under conditions and to be treated in a manner that takes account of his or her age.
- (3) For the purpose of this section a child shall mean a person under the age of 18 years and in all matters concerning such child his or her best interest shall be paramount.

#### 31. LANGUAGE AND CULTURE

Every person shall have the right to use the language and to participate in the cultural life of his or her choice.

#### 32. EDUCATION

Every person shall have the right-

- a. to basic education and to equal access to educational institutions;
- to instruction in the language of his or her choice where this is reasonably practicable; and
- c. to establish, where practicable, educational institutions based on a common culture, language or religion, provided that there shall be no discrimination on the ground of race.

#### 33. LIMITATION

- (1) he rights entrenched in this Chapter may be limited by law of general application, provided that such limitation
  - a. shall be permissible only to the extent that it is
    - i. reasonable; and
    - ii. justifiable in an open and democratic society based on freedom and equality; and
  - b. shall not negate the essential content of the right in question, and provided further that any limitation to-
    - (aa) a right entrenched in section 10, 11, 12, 14 (1), 21, 25 or 30 (1) (d) or (e) or (2); or
    - (bb) a right entrenched in section 15, 16, 17, 18, 23 or 24, in so far as such right relates to free and fair political activity, shall, in addition to being reasonable as required in paragraph (a) (i), also be necessary.
- (2) Save as provided for in subsection (1) or any other provision of this Constitution, no law, whether a rule of the common law, customary law or legislation, shall limit any right entrenched in this Chapter.
- (3) The entrenchment of the rights in terms of this Chapter shall not be construed as denying the existence of any other rights or freedoms recognised or conferred by common law, customary law or legislation to the extent that they are not inconsistent with this Chapter.



- (4) This Chapter shall not preclude measures designed to prohibit unfair discrimination by bodies and persons other than those bound in terms of section 7 (1).
- (5) a. The provisions of a law in force at the commencement of this Constitution promoting fair employment practices, orderly and equitable collective bargaining and the regulation of industrial action shall remain of full force and effect until repealed or amended by the legislature.
  - b. If a proposed enactment amending or repealing a law referred to in paragraph (a) deals with a matter in respect of which the National Manpower Commission, referred to in section 2A of the Labour Relations Act, 1956 (Act 28 of 1956), or any other similar body which may replace the Commission, is competent in terms of a law then in force to consider and make recommendations, such proposed enactment shall not be introduced in Parliament unless the said Commission or such other body has been given an opportunity to consider the proposed enactment and to make recommendations with regard thereto.



# **ANNEXURE 4:**

# MANAGING FINANCES AND OTHER RESOURCES

Because of the number of responsibilities that the Government is to attend to, the budgetary allocations that the Government makes for different Departments including DOE is generally not enough to provide for education for everyone. It is for this reason therefore, that parents are requested to pay school fees for learners at public schools.

School fees may be paid:

- Only when the majority of the parents agree that it is to be paid;
- Approve the school fee amount;
- Equitable rules are applied.

To supplement these funds and to cater for other needs including providing bursaries for learners whose parents cannot afford to pay school fees, the SGB is tasked with the responsibility of raising funds from other sources.

Since this is not a duty that the SGB can do leisurely but is a requirement by law that the SGB does this, you as a manager have a responsibility to come up with innovative ways as to how this can be done. Many schools run cake sales, stage school fetes, and/ or host food stalls and tuck shops especially during sporting events. The SGB may even call for help from old students of the school who now occupy senior positions in organisations for which they work.

Other monies that may come into the school may come in the form of

- Donations from individuals or private companies;
- Trust money, which may be given to the school in trust. This money is not to be used for any other purpose other than that for which it was donated.

It is the duty of the SGB to make sure that such funds as are accumulated are:

- Banked in the name of the school with a reputable registered bank;
- Administered in terms of the rules of the HoD. It is important that you as the manager always keep and update yourself with the new set of rules.
- The records of such monies kept accurately.

It is your duty as a manager of the school and as a member of the SGB to make sure that the annual budget is formulated on time before the start of the new school year. This is the outline of funds for all the income expected and all the expenditure to be incurred by the school in the following year.

Before you can embark on the business of budget formulation, the following needs to be done:

- Assign a smaller task team to attend to the compilation of the budget.
- Make sure you have all the financial information at hand, e.g. state allocations, possible school fees for the following year, the likely expenditure, and;
- Guidelines to be used in compiling the budget as provided by your province.



Once the budget has been formulated and been referred to the broader SGB for provisional ratification, it then needs to:

- · Be referred to the general meeting of parents, and
- · Gain approval from the majority of parents present at the meeting.

Once all this has been done, then you as the manager of the school must make sure that:

- Records of all the transactions, including financial and assets register, are kept.
- Financial statements are drawn every year.
- The auditing of these financial statements takes place.
- The audited financial statements are sent to the HoD within six months from the end of the year.
- These are made available to whoever wants to see them, e.g. parents of the learners at the school.



# **ANNEXURE 5:**

#### PERTINENT SECTIONS OF THE PUBLIC SERVICE ACT OF 1994

- (5) Subject to the provisions of this Act, an executing authority shall have those powers and duties-
  - (a) regarding the internal organisation of the office or department concerned, including the organisational structure and the transfer of functions within that office or department;
  - (b) regarding the post establishment of that office or department, including the creation, grading and abolition of posts and the provision for the employment of persons additional to the fixed establishment where the class of work is of a temporary nature;
  - (c) regarding the recruitment, appointment, performance management, promotion, transfer, discharge and other career incidents of officers and employees of that office or department, including any other matter which relates to such officers and employees in their individual capacities,

which are entrusted to the executing authority by or under this Act, and such powers and duties shall be exercised or performed by the executing authority in accordance with the provisions of this Act.

- (6) (a) The relevant executing authority may perform any act in connection with any matter which relates to or arises from the employment or the conditions of service of a former officer or employee whilst he or she was an officer or employee, provided that executing authority would at the relevant time have been competent in terms of this Act or any other law to perform any such act in respect of a serving officer or employee.
  - (b) No such act shall be to the detriment of a former officer or employee, and the relevant executing authority shall not perform any such act in respect of any former officer or employee after the expiry of a period of two years after he or she ceased to be an officer or employee.

[S. 3 amended by Proclamation R175 of 2 December 1994, substituted by s. 3 of Act 47 of 1997 and amended by s. 1 of Act 5 of 1999.]



# PUBLIC SERVICE, DEPARTMENTS AND HEADS OF DEPARTMENTS

(1) The public service established by section 197 (1) of the Constitution shall be structured and organised as provided for in this Act.

[Sub-s. (1) substituted by s. 4 (a) of Act 47 of 1997.]

(2) For the purposes of the administration of the public service there shall be national departments and provincial administrations mentioned in the first column of Schedule 1, provincial departments mentioned in the first column of Schedule 2 and the organisational components mentioned in the first column of Schedule 3.

[Sub-s. (2) substituted by s. 4 (a) of Act 86 of 1998.]

- (3) (a) Each department shall have a head of department who as an officer shall be the incumbent of the post on the fixed establishment bearing the designation mentioned in the second column of Schedule 1 or 2 opposite the name of the relevant department, or the officer who is acting in that post.
  - (b) Subject to the provisions of paragraphs (c) and (d), a head of department shall be responsible for the efficient management and administration of his or her department, including the effective utilisation and training of staff, the maintenance of discipline, the promotion of sound labour relations and the proper use and care of State property, and he or she shall perform the functions that may be prescribed.
  - (c) In addition to any power or duty entrusted or assigned by or under this Act or any other law to the head of a provincial administration, the said head shall—
    - (i) be the Secretary to the Executive Council of the province concerned;
    - (ii) subject to the provisions of sections 85 (2) (c) and 125 (2) (e) of the Constitution, be responsible for intergovernmental relations between the relevant provincial administration and other provincial administrations as well as national departments and for the intragovernmental co-operation between the relevant provincial administration and its various provincial departments, including the co-ordination of their actions and legislation; and
    - (iii) subject to the provisions of paragraph (d), be responsible for the giving of strategic direction on any matter referred to in section 3 (2) (a).
  - (d) The head of a provincial administration shall in respect of a provincial department exercise no power or perform no duty which is entrusted or assigned by or under this Act or any other law to the head of the provincial department.
  - (e) The incumbent of a post mentioned in the second column of Schedule 2 shall not by virtue only of such incumbency be entitled to the rank, status or salary scale and accompanying benefits of the incumbent of a post mentioned in the second column of Schedule 1.

[Sub-s. (3) substituted by s. 4 (b) of Act 86 of 1998.]



- (4) (a) An organisational component mentioned in the first column of Schedule 3 and the officer who is the incumbent of the post bearing the designation mentioned in the second column of the said Schedule 3 opposite the name of the relevant organisational component, or the officer who is acting in that post, shall for the purposes of this Act be deemed to be a department and a head of department, respectively.
  - (b) The incumbent of a post contemplated in this subsection shall not by virtue only of such incumbency be entitled to the rank, status or salary scale and accompanying benefits of the incumbent of a post mentioned in the second column of Schedule 1.

[Sub-s. (4) substituted by s. 4 (c) of Act 86 of 1998.]

- (b) The Minister shall accept responsibility for -
  - (i) any policy which relates to a matter referred to in paragraph (a); and
  - (ii) the provision of a framework of norms and standards with a view to giving effect to any such policy.

### (3) The Minister may -

(a) advise the President regarding the establishment or abolition of any department or organisational component in the national sphere of government, or the designation of any such department or organisational component or the head thereof, in order to enable the President to amend Schedule 1 or 3;

[Para. (a) substituted by s. 2 (a) of Act 86 of 1998.]

- (b)\* after consultation with the relevant executing authority or executing authorities, as the case may be, make determinations regarding the allocation of any function to, or the abolition of any function of, any department or the transfer of any function from one department to another or from a department to any other body or from any other body to a department: Provided that the provisions of this paragraph shall not be construed so as to empower the Minister -
  - (i) to allocate any function to, or to abolish any function of, any provincial administration or provincial department except in consultation with the Premier of the province concerned; or
  - (ii) to transfer any function from one provincial administration or provincial department to another or from a provincial administration or provincial department to any body established by or under any provincial law or from any such body to a provincial administration or provincial department;

[Para. (b) substituted by s. 2 (b) of Act 86 of 1998.]



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- (c) subject to the provisions of this Act, make determinations regarding the conditions of service of officers and employees generally, including the scales of salaries, wages or allowances of all the various classes, ranks and grades of officers and employees as well as salary ranges in respect of particular classes, ranks and grades of officers and employees;
- (d) make regulations under section 41 (1);
- (e) issue directives which are not inconsistent with this Act to elucidate or supplement any regulation.
- (4) (a) If so requested by the President or an executing authority, the Minister may advise, or assist in such manner or on such conditions as the Minister may determine, the President or the relevant executing authority as to any matter relating to -
  - (i) the public service;
  - (ii) the employment, remuneration or other conditions of service of persons employed in a department in terms of any law other than this Act or of functionaries employed by any board, institution or body established by or under any law and which obtains its funds, either wholly or in part, from revenue;
  - (iii) the remuneration or other conditions of appointment of the office-bearers of any such board, institution or body; or
  - (iv) the staffing, employment or other personnel practices of any such board, institution or body.

[Para. (a) amended by s. 2 (c) of Act 86 of 1998.]

(b) For the purposes of paragraph (a), the Minister has access to such official documents or may obtain such information from the chief executive officer of the relevant board, institution or body as may be necessary to advise or assist the President or the relevant executing authority.

[Para. (b) substituted by s. 2 (d) of Act 86 of 1998.]

- (5) Subject to the provisions of this Act, an executing authority shall have those powers and duties -
  - (a) regarding the internal organisation of the office or department concerned, including the organisational structure and the transfer of functions within that office or department;
  - (b) regarding the post establishment of that office or department, including the creation, grading and abolition of posts and the provision for the employment of persons additional to the fixed establishment where the class of work is of a temporary nature;



(c) regarding the recruitment, appointment, performance management, promotion, transfer, discharge and other career incidents of officers and employees of that office or department, including any other matter which relates to such officers and employees in their individual capacities,

which are entrusted to the executing authority by or under this Act, and such powers and duties shall be exercised or performed by the executing authority in accordance with the provisions of this Act.

- (6) (a) The relevant executing authority may perform any act in connection with any matter which relates to or arises from the employment or the conditions of service of a former officer or employee whilst he or she was an officer or employee, provided that executing authority would at the relevant time have been competent in terms of this Act or any other law to perform any such act in respect of a serving officer or employee.
  - (b) No such act shall be to the detriment of a former officer or employee, and the relevant executing authority shall not perform any such act in respect of any former officer or employee after the expiry of a period of two years after he or she ceased to be an officer or employee.

[S. 3 amended by Proclamation R175 of 2 December 1994, substituted by s. 3 of Act 47 of 1997 and amended by s. 1 of Act 5 of 1999.]

# **3A FUNCTIONS OF PREMIERS**

The Premier of a province may -

- (a) subject to the provisions of section 7 (5), establish or abolish any department of the provincial administration concerned;
- (b) make determinations regarding the allocation of any function to, or the abolition of any function of, any office or department of the provincial administration concerned or the transfer of any function from one such office or department to another or from such office or department to any body established by or under any law of the provincial legislature or from any such body to such office or department.

[S. 3A inserted by s. 3 of Act 86 of 1998.]

# 3B HANDLING OF APPOINTMENT AND OTHER CAREER INCIDENTS OF HEADS OF DEPARTMENT

- (1) Notwithstanding anything to the contrary contained in this Act, the appointment and other career incidents of the heads of department shall be dealt with by, in the case of –
  - (a) a head of a national department or organisational component, the President; and
  - (b) a head of a provincial administration, department or office, the relevant Premier.

- (2) Any person appointed as head of department may before or at the expiry of his or her term of office, or extended term of office, be deployed with his or her consent by the relevant executing authority referred to in paragraph (a) or (b) of subsection (1) in the case of -
  - (a) a head of a national department or organisational component, to perform functions in a similar or any other capacity in any national department or organisational component in a post or against a post of equal, higher or lower grading, or additional to the establishment, as the executing authority deems fit; and
  - (b) a head of a provincial administration, department or office, to perform functions in a similar or any other capacity in the administration, department or office of the relevant province in a post or against a post of equal, higher or lower grading or additional to the establishment, as the executing authority deems fit.
- (3) Any person appointed as head of department who thereafter is deployed in accordance with subsection (2), shall -
  - (a) for the unexpired portion of his or her term of office, or extended term of office, be appointed at the same salary and conditions of service; and
  - (b) at the expiry of his or her term of office, or extended term of office, be appointed at the salary and conditions of service attaching to the post or capacity in which he or she is appointed.
- (4) The executing authority referred to in paragraph (a) or (b) of subsection (1) may delegate or assign any power or duty to appoint the head referred to in that paragraph, as well as any power or duty regarding the other career incidents of that head, in the case of -
  - (a) the President, to the Deputy President or a Minister; or
  - (b) the Premier of a province, to a Member of the relevant Executive Council.
  - [S. 3B inserted by s. 1 of Act 5 of 1999.]

# 4. SOUTH AFRICAN MANAGEMENT AND DEVELOPMENT INSTITUTE AND TRAINING FUND

- (1) The management and administration of the South African Management and Development Institute shall be under the control of the Minister.
- (2) The Institute -
  - (a) shall provide such training or cause such training to be provided or conduct such examinations or tests or cause such examinations or tests to be conducted as the Head: South African Management and Development Institute may with the approval of the Minister decide or as may be prescribed as a qualification for the appointment, promotion or transfer of persons in or to the public service;
  - (b) may issue diplomas or certificates or cause diplomas or certificates to be issued to persons who have passed such examinations.



- (3) Notwithstanding the substitution of section 3 (5) (a) (iii) by the Public Service Laws Amendment Act, 1997, the Training Fund established under the said section shall continue to exist, and the Fund shall consist of
  - (a) all moneys which immediately prior to the commencement of the said Act were moneys of the Fund;
  - (b) such moneys as may from time to time be appropriated by Parliament with a view to promoting training under this Act;
  - (c) any other moneys accruing to the Fund in terms of this Act or from any other source.
- (4) (a) The Fund shall be administered by the Head, who shall be the accounting officer charged with the responsibility of accounting for moneys received by, and disbursements made from, the Fund.
  - (b) Moneys in the Fund shall be utilised to promote training under this Act, but moneys or other property donated or bequeathed to the Fund shall be utilised in accordance with the conditions of the donation or bequest concerned.
  - (c) Moneys in the Fund not required for immediate use may be invested with the Public Investment Commissioners or in such other manner as the Minister may with the concurrence of the Minister of Finance approve.
- (5) (a) The financial year of the Fund shall terminate on the last day in March in each year.
  - (b) The Head shall -
    - (i) cause records to be kept of moneys received by, and disbursements made from, the Fund and of its assets, liabilities and financial transactions;
    - (ii) as soon as may be practicable after the end of each financial year, cause annual financial statements to be prepared reflecting, with appropriate details, moneys received by, and disbursements made from, the Fund during, and its assets and liabilities at the end of, that financial year.
  - (c) The records and annual financial statements shall be audited annually by the Auditor-General.
  - [S. 4 amended by Proclamation 134 of 12 August 1994 and substituted by s. 3 of Act 47 of 1997.]

# 5. IMPLEMENTATION OR LIMITATION OF ACTIONS AFFECTING PUBLIC SERVICE OR ITS MEMBERS

- (1) For the purposes of this Act or any other law -
  - (a) a concurrence or determination of the Minister shall be deemed to have been expressed or made on the date of the communication in writing conveying such concurrence or determination:





- (b) where any executing authority or other person is required to act in consultation with the Minister, such act shall be deemed to be implemented by the relevant executing authority or person on the date of the communication in writing conveying to the affected person or body that the executing authority or person is acting in consultation with the Minister;
- (c) where the Minister is competent to make a determination, such determination shall be deemed to be implemented on the date on which such determination is made, unless expressly stated otherwise in the communication in writing conveying such determination.
- (2) Subject to the provisions of subsection (3), any determination of the Minister may be withdrawn or varied or further varied by the Minister at any time within a period of six calendar months from the date upon which it was made by the Minister or varied the previous time.
- (3) A determination by the Minister involving expenditure from revenue shall not be implemented unless the Treasury approves the expenditure.
- (4) Every act of the Minister, any executing authority or any other person, irrespective of whether such act consists of the making of any regulation or other enactment, the making of any determination or the taking of any decision, which relates to any matter which constitutes the subject matter of any collective agreement contemplated in item 15 (i) of Schedule 7 to the Labour Relations Act, 1995 (Act 66 of 1995), or of any collective agreement concluded by a bargaining council established in terms of the said Act for the public service as a whole or for a particular sector in the public service, shall be performed only in accordance with any such collective agreement.
- (5) Notwithstanding the provisions of subsection (4) -
  - (a) any executing authority or other person may act in respect of a particular officer or employee in accordance with the provisions of this Act or any other law: Provided that where any such act constitutes any deviation from a collective agreement referred to in the said subsection (4), it shall not derogate from or annul such a collective agreement or the collective bargaining relationship, or reduce the remuneration or other service benefits of the particular officer or employee, or deprive that officer or employee of his or her remuneration or other service benefits, except in accordance with section 34; or
  - (b) the last offer made by the State as employer in a bargaining council referred to in the said subsection (4) on a specific matter may, if a deadlock in negotiations is reached, be implemented by acting in terms of the provisions of this Act or any other law, provided any such act does not have the effect of reducing existing remuneration or other service benefits, except in accordance with section 34.

[S. 5 amended by Proclamation 105 of 11 June 1994 and substituted by s. 3 of Act 47 of 1997.]



# 6. ACCESS TO DOCUMENTS AND INFORMATION BY MINISTER

The Minister has access to such official documents or may obtain such information from heads of departments or from officers or employees in the service of those departments as may be necessary for the performance of his or her functions under this Act or any other law.

[S. 6 substituted by s. 3 of Act 47 of 1997.]

# CHAPTER III ORGANISATION AND STAFF (ss 7-8)

# 7. PUBLIC SERVICE, DEPARTMENTS AND HEADS OF DEPARTMENTS

(1) The public service established by section 197 (1) of the Constitution shall be structured and organised as provided for in this Act.

[Sub-s. (1) substituted by s. 4 (a) of Act 47 of 1997.]

(2) For the purposes of the administration of the public service there shall be national departments and provincial administrations mentioned in the first column of Schedule 1, provincial departments mentioned in the first column of Schedule 2 and the organisational components mentioned in the first column of Schedule 3.

[Sub-s. (2) substituted by s. 4 (a) of Act 86 of 1998.]

- (3) (a) Each department shall have a head of department who as an officer shall be the incumbent of the post on the fixed establishment bearing the designation mentioned in the second column of Schedule 1 or 2 opposite the name of the relevant department, or the officer who is acting in that post.
  - (b) Subject to the provisions of paragraphs (c) and (d), a head of department shall be responsible for the efficient management and administration of his or her department, including the effective utilisation and training of staff, the maintenance of discipline, the promotion of sound labour relations and the proper use and care of State property, and he or she shall perform the functions that may be prescribed.
  - (c) In addition to any power or duty entrusted or assigned by or under this Act or any other law to the head of a provincial administration, the said head shall
    - (i) be the Secretary to the Executive Council of the province concerned;
    - (ii) subject to the provisions of sections 85 (2) (c) and 125 (2) (e) of the Constitution, be responsible for intergovernmental relations between the relevant provincial administration and other provincial administrations as well as national departments and for the intragovernmental co-operation between the relevant provincial administration and its various provincial departments, including the co-ordination of their actions and legislation; and



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- (iii) subject to the provisions of paragraph (d), be responsible for the giving of strategic direction on any matter referred to in section 3 (2) (a).
- (d) The head of a provincial administration shall in respect of a provincial department exercise no power or perform no duty which is entrusted or assigned by or under this Act or any other law to the head of the provincial department.
- (e) The incumbent of a post mentioned in the second column of Schedule 2 shall not by virtue only of such incumbency be entitled to the rank, status or salary scale and accompanying benefits of the incumbent of a post mentioned in the second column of Schedule 1.

[Sub-s. (3) substituted by s. 4 (b) of Act 86 of 1998.]

- (4) (a) An organisational component mentioned in the first column of Schedule 3 and the officer who is the incumbent of the post bearing the designation mentioned in the second column of the said Schedule 3 opposite the name of the relevant organisational component, or the officer who is acting in that post, shall for the purposes of this Act be deemed to be a department and a head of department, respectively.
  - (b) The incumbent of a post contemplated in this subsection shall not by virtue only of such incumbency be entitled to the rank, status or salary scale and accompanying benefits of the incumbent of a post mentioned in the second column of Schedule 1.

[Sub-s. (4) substituted by s. 4 (c) of Act 86 of 1998.]

- (5) (a) The President may-
  - (i) on the advice of the Minister on the establishment or abolition of any department or organisational component in the national sphere of government, or the designation of any such department or organisational component or the head thereof, amend Schedule 1 or 3 by proclamation in the Gazette; or
  - (ii) at the request of the Premier of a province for the establishment or abolition of any department of the provincial administration concerned, or the designation of any such department or the head thereof, amend Schedule 2 by proclamation in the Gazette,

which amendment, if the President considers it necessary, may be effected retrospectively to the date of the said advice or request, as the case may be.

(b) The President shall give effect to any request referred to in paragraph (a) (ii) if the President is satisfied that it is consistent with the provisions of the Constitution or this Act.

[Sub-s. (5) substituted by s. 4 (b) of Act 47 of 1997 and by s. 4 (d) of Act 86 of 1998.]



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# 8. COMPOSITION OF PUBLIC SERVICE

- (1) The public service shall consist of persons who -
  - (a) hold posts on the fixed establishment-
    - (i) classified in the A division and the B division;
    - (ii) in the services;
    - (iii) in the Agency or the Service; and

[Sub-para. (iii) amended by s. 32 (1) of Act 38 of 1994.]

- (iv) in state educational institutions;
- (b) (i) having ceased to hold posts on the fixed establishment contemplated in paragraph (a), and not having retired or having been discharged, are employed additional to the fixed establishment or who are deemed to continue to hold posts under the circumstances contemplated in subsection (3) (c);
  - (ii) are appointed permanently additional to the fixed establishment;
- (c) (i) hold posts on the fixed establishment other than posts referred to in paragraph (a);
  - (ii) are employed temporarily or under a special contract in a department, whether in a full-time or part-time capacity, additional to the fixed establishment or in vacant posts on the fixed establishment.
- (2) The Minister may make determinations regarding the posts to be included in the A and the B division, respectively.

[Sub-s. (2) substituted by s. 5 (a) of Act 47 of 1997.]

- (3) (a) The Minister may make a determination that any post included in one division shall be removed from that division and be included in the other division, or that any post included in the A or B division shall be excluded from both those divisions.
  - (b) A determination under this subsection shall not deprive any officer of any leave or other prescribed privilege or right which arose from the occupancy by him or her of a post in one of the said divisions.
  - (c) Any officer whose post has been excluded from both the divisions aforementioned shall, for the purposes of this Act and the applicable pension law, be deemed to continue to hold a post in the division in which his or her post was included immediately before the determination whereby such exclusion was effected came into force.

[Sub-s. (3) substituted by s. 5 (b) of Act 47 of 1997.]



# CHAPTER IV APPOINTMENT, PROMOTION AND TRANSFER (ss 9-15)

#### 9. POWERS OF EXECUTING AUTHORITY

- (1) The appointment of any person or the promotion or transfer of any officer or employee in the employ of a department shall be made by the relevant executing authority or by an officer or officers to whom the said authority has delegated his or her power of appointment, promotion or transfer.
- (2) Subject to the provisions of this Chapter, appointments and promotions in, and transfers in or to, the public service shall be made in such manner and on such conditions as may be prescribed.
- [S. 9 substituted by s. 6 of Act 47 of 1997.]

# 10. QUALIFICATIONS FOR APPOINTMENT

- (1) No person shall be appointed permanently or be transferred and appointed permanently under section 15 (1), whether on probation or not, to any post in the A or B division unless he or she-
  - (a) is a South African citizen;
  - (b) is of good character; and
  - (c) in so far as his or her condition of health is concerned, complies with such requirements as may be prescribed.

[Para. (c) substituted by s. 7 of Act 47 of 1997.]

(2) Notwithstanding the provisions of subsection (1) (c), a person may be appointed on probation, but his or her appointment shall not be confirmed unless he or she complies with the requirements contemplated in that paragraph.

# 11. APPOINTMENTS AND FILLING OF POSTS

- (1) In the making of appointments and the filling of posts in the public service due regard shall be had to equality and the other democratic values and principles enshrined in the Constitution.
- (2) In the making of any appointment or the filling of any post in the public service-
  - (a) all persons who qualify for the appointment, transfer or promotion concerned shall be considered; and
  - (b) the evaluation of persons shall be based on training, skills, competence, know-ledge and the need to redress the imbalances of the past to achieve a public service broadly representative of the South African people, including representation according to race, gender and disability.



(3) Notwithstanding the provisions of subsection (2), the relevant executing authority may, subject to the prescribed conditions, approve the appointment, transfer or promotion of persons to promote the basic values and principles referred to in section 195 (1) of the Constitution.

[S. 11 substituted by s. 8 of Act 47 of 1997.]

#### 12. APPOINTMENT OF HEADS OF DEPARTMENT

- (1) Any person who immediately prior to the commencement of the Public Service Laws Amendment Act, 1997-
  - (a) was appointed in the office of head of department or to any post mentioned in the second column of Schedule 2 or 3, or was promoted or transferred to that office or post; or

[Para. (a) substituted by s. 5 (a) of Act 86 of 1998.]

- (b) was promoted or transferred from the office of head of department referred to in paragraph (a) to another office of head of department, shall occupy, subject to the provisions of Chapter V and any collective agreement contemplated in section 18 (b) of the Public Service Laws Amendment Act, 1998 –
  - (i) in the case of a person referred to in paragraph (a)-
    - (aa) that office for a period of five years as from the date of his or her appointment, promotion or transfer, or the shorter period approved by the relevant executing authority, and if the term of office was extended at the expiry thereof, for the extended period approved by that executing authority;
    - (bb) that post for a period of five years as from the date of commencement of the Public Service Laws Amendment Act, 1997;

[Para. (i) substituted by s. 5 (c) of Act 86 of 1998.]

(ii) in the case of a person referred to in paragraph (b), the latter office for the remainder of the term of office which applies to him or her in terms of paragraph (i) in respect of the former office, and if the term of office was extended at the expiry thereof, for the extended period approved by the relevant executing authority.

[Sub-s. (1) amended by s. 5 (b) of Act 86 of 1998.]

- (2) As from the date of commencement of the Public Service Laws Amendment Act, 1997 -
  - (a) a person shall be appointed in the office of head of department in the prescribed manner, on the prescribed conditions and in terms of the prescribed contract between the relevant executing authority and such a person for a period of five years from the date of his or her appointment, or such shorter period as that executing authority may approve;



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- (b) the term of office as head of department of such a person may be extended at the expiry thereof in accordance with the terms and conditions of the contract or a further contract, as the case may be, concluded between that executing authority and such a person for a period or successive periods of not less than twelve months and not more than five years, as that executing authority may approve;
- (c) the term of office as head of department of any person referred to in subsection (1), or any extended term thereof, may be extended at the expiry of the term of office or extended term, as the case may be, in the prescribed manner for a period of not less than twelve months and not more than five years, as the relevant executing authority may approve, provided the said person concludes the prescribed contract with that executing authority, whereupon any further extension of his or her term of office shall, subject to the provisions of paragraph (b), take place in accordance with the terms and conditions of that contract or a further contract, as the case may be.
- (3) Notwithstanding the provisions of subsection (1), any person referred to in that subsection may at any time after the commencement of the Public Service Laws Amendment Act, 1997, conclude a contract contemplated in subsection (2) with the relevant executing authority.

[Sub-s. (3) inserted by s. 5 (d) of Act 86 of 1998.]

- (4) Notwithstanding the provisions of subsection (2), a contract contemplated in that subsection may include any term and condition agreed upon between the relevant executing authority and the person concerned as to -
  - (a) any particular duties of the head of department;
  - (b) the specific performance criteria for evaluating the performance of the head of department;
  - (c) the grounds upon, and the procedures according to which, the services of the head of department may be terminated before the expiry of his or her term of office or extended term of office, as the case may be; and
  - (d) any other matter which may be prescribed.

[Sub-s. (4), formerly sub-s. (3), renumbered by s. 5 (d) of Act 86 of 1998.] [S. 12 amended by s. 32 (1) of Act 38 of 1994 and by s. 2 (a) and (b) of Act 13 of 1996 and substituted by s. 9 of Act 47 of 1997.]

# 12A. APPOINTMENT OF PERSONS ON GROUNDS OF POLICY CONSIDERATIONS

(1) Subject to the provisions of this section, an executing authority may appoint one or more persons under a special contract, whether in a full-time or part-time capacity-

- (a) to advise the executing authority on the exercise or performance of the executing authority's powers and duties;
- (b) to advise the executing authority on the development of policy that will promote the relevant department's objectives; or
- (c) to perform such other tasks as may be appropriate in respect of the exercise or performance of the executing authority's powers and duties.
- (2) The maximum number of persons that may be appointed by an executing authority under this section and the upper limits of the remuneration and other conditions of service of such persons shall be determined by the Cabinet in the national sphere of government.
- (3) The special contract contemplated in subsection (1) shall include any term and condition agreed upon between the relevant executing authority and the person concerned, including-
  - (a) the contractual period, which period shall not exceed the term of office of the executing authority;
  - (b) the particular duties for which the person concerned is appointed; and
  - (c) the remuneration and other conditions of service of the person concerned.
  - [S. 12A inserted by s. 6 of Act 86 of 1998.]

# 13. APPOINTMENT, TRANSFER AND PROMOTION ON PROBATION

- (1) The appointment of a person and the transfer or promotion of an officer in the A or B division shall be made on probation
  - (a) unless, in the case of an appointment, the person having the power to approve such an appointment, directs otherwise; or
  - (b) if, in the case of a promotion or a transfer, the person having the power to approve such a transfer or promotion, so directs.
- (2) (a) Subject to the provisions of paragraphs (b) and (c), the period of probation shall not be less than 12 calendar months.
  - (b) If an officer who is serving on probation is transferred or promoted to another post, a lesser period of service on probation may be directed in the new post which, together with the period of probation served in the former post, shall total at least 12 calendar months.
  - (c) The period of probation of an officer shall be extended by the number of days leave taken by him or her during the period of probation or any extension thereof.



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- (3) If the head of the office, branch, subdepartment, institution or department certifies that, during the period of probation or extended period of probation, the officer concerned has been diligent and his or her conduct has been uniformly satisfactory and that he or she is in all respects suitable for the post which he or she holds, and if the officer has complied with all the conditions to which his or her appointment, transfer or promotion was subject, the person having the power to make the appointment, transfer or promotion concerned, may confirm that appointment, transfer or promotion, but if the probationary appointment, transfer or promotion is not so confirmed, the person having the power to make the appointment, transfer or promotion concerned may extend the period of probation or act in accordance with the provisions of subsection (5).
- (4) .....
- (5) Notwithstanding anything to the contrary contained in subsection (2) or in any collective agreement contemplated in section 18 (b) of the Public Service Laws Amendment Act, 1998, but subject to the provisions of subsection (6), an officer who is serving on probation may be discharged from the public service by the person having the power of discharge, whether during or at or after the expiry of the period of probation -
  - (a) by the giving of one month's written notice to such officer; or
  - (b) forthwith, but subject to the provisions of the Labour Relations Act, 1995 (Act 66 of 1995), if his or her conduct or performance is unsatisfactory.

[Sub-s. (5) amended by s. 7 of Act 86 of 1998.]

(6) Notwithstanding anything to the contrary contained in sections 14 and 34, a person whose transfer or promotion on probation is not confirmed and who immediately prior to that transfer or promotion on probation was an officer, other than an officer on probation, shall be transferred to the post formerly held by him or her, or to a post of equivalent grading, and shall receive such salary as he or she would have received in the said former post if he or she had not been transferred or promoted on probation.

#### 10. QUALIFICATIONS FOR APPOINTMENT

- (1) No person shall be appointed permanently or be transferred and appointed permanently under section 15 (1), whether on probation or not, to any post in the A or B division unless he or she-
  - (a) is a South African citizen;
  - (b) is of good character; and
  - (c) in so far as his or her condition of health is concerned, complies with such requirements as may be prescribed.

[Para. (c) substituted by s. 7 of Act 47 of 1997.]

(2) Notwithstanding the provisions of subsection (1) (c), a person may be appointed on probation, but his or her appointment shall not be confirmed unless he or she complies with the requirements contemplated in that paragraph.

#### 11. APPOINTMENTS AND FILLING OF POSTS

- (1) In the making of appointments and the filling of posts in the public service due regard shall be had to equality and the other democratic values and principles enshrined in the Constitution.
- (2) In the making of any appointment or the filling of any post in the public service -
  - (a) all persons who qualify for the appointment, transfer or promotion concerned shall be considered; and
  - (b) the evaluation of persons shall be based on training, skills, competence, knowledge and the need to redress the imbalances of the past to achieve a public service broadly representative of the South African people, including representation according to race, gender and disability.
- (3) Notwithstanding the provisions of subsection (2), the relevant executing authority may, subject to the prescribed conditions, approve the appointment, transfer or promotion of persons to promote the basic values and principles referred to in section 195 (1) of the Constitution.

[S. 11 substituted by s. 8 of Act 47 of 1997.]

# 12. APPOINTMENT OF HEADS OF DEPARTMENT

- (1) Any person who immediately prior to the commencement of the Public Service Laws Amendment Act, 1997
  - (a) was appointed in the office of head of department or to any post mentioned in the second column of Schedule 2 or 3, or was promoted or transferred to that office or post; or

[Para. (a) substituted by s. 5 (a) of Act 86 of 1998.]

(b) was promoted or transferred from the office of head of department referred to in paragraph (a) to another office of head of department,

shall occupy, subject to the provisions of Chapter V and any collective agreement contemplated in section 18 (b) of the Public Service Laws Amendment Act, 1998-

- (i) in the case of a person referred to in paragraph (a)-
  - (aa) that office for a period of five years as from the date of his or her appointment, promotion or transfer, or the shorter period approved by the relevant executing authority, and if the term of office was extended at the expiry thereof, for the extended period approved by that executing authority;





(bb) that post for a period of five years as from the date of commencement of the Public Service Laws Amendment Act, 1997;

[Para. (i) substituted by s. 5 (c) of Act 86 of 1998.]

(ii) in the case of a person referred to in paragraph (b), the latter office for the remainder of the term of office which applies to him or her in terms of paragraph (i) in respect of the former office, and if the term of office was extended at the expiry thereof, for the extended period approved by the relevant executing authority.

[Sub-s. (1) amended by s. 5 (b) of Act 86 of 1998.]

(2) As from the date of commencement of the Public Service Laws Amendment Act, 1997 -

#### 14. TRANSFERS WITHIN PUBLIC SERVICE

- (1) Subject to the provisions of this Act, every officer or employee may, when the public interest so requires, be transferred from the post or position occupied by him or her to any other post or position in the same or any other department, irrespective of whether such a post or position is in another division, or is of a lower or higher grade, or is within or outside the Republic.
- (2) (a) The transfer of an officer or employee from one post or position to another post or position may, subject to the provisions of paragraph (b), be made on the authority of the person having the power of transfer.

[Para. (a) substituted by s. 11 (a) of Act 47 of 1997.]

- (b) In the case of a transfer from one department to another department the approval of the persons who in respect of each of those departments have the power to transfer, shall first be obtained.
- (c) .....

[Para. (c) amended by s. 32 (1) of Act 38 of 1994 and deleted by s. 11 (b) of Act 47 of 1997.]

(d) .....

[Para. (d) deleted by s. 11 (b) of Act 47 of 1997.]

#### (3) An officer –

(a) shall not upon transfer suffer any reduction in his or her salary or scale of salary without his or her consent, except in accordance with the provisions of section 38 and any collective agreement contemplated in section 18(b) of the Public Service Laws Amendment Act, 1998;

[Para. (a) substituted by s. 8 of Act 86 of 1998.]



- (b) .....
- [Para. (b) deleted by s. 11 (c) of Act 47 of 1997.]
- (c) who has been transferred to or who is employed in a post which is graded higher than his or her own grade, or which is regraded or converted to a post of a higher grade than his or her own grade, shall not by reason only of that transfer or employment be entitled to the higher scale of salary applicable to the post;
- (d) .....

[Para. (d) deleted by s. 11 (c) of Act 47 of 1997.]

(e) holding a post in the A or B division shall not without his or her consent be transferred to a post in any branch of the services or in the Agency or the Service.

[Para. (e) amended by s. 32 (1) of Act 38 of 1994.]

(4) A member of any of the three branches of the services shall not without his or her consent be transferred to a post in any other of those branches or to a post in the A or B division, and a member of the Agency or the Service shall not, subject to the provisions of any law regulating the service of such a member, without his or her consent be transferred to a post in such a division.

[Sub-s. (4) amended by s. 32 (1) of Act 38 of 1994.]

# 15. TRANSFER AND SECONDMENT OF OFFICIALS

- (1) A person holding a pensionable appointment in a department under any law other than this Act or in any institution or body established by or under any law and which obtains its funds directly in whole or in part from revenue, may be transferred to, and appointed in, a post in the A or B division.
- (2) A person in the service of a department under any law other than this Act, or in the service of another government, or of any council, institution or body established by or under any law, or of any other body or person, may be employed by another department or a department, as the case may be, for a particular service or for a stated period and on such terms and conditions, other than conditions laid down by or under any pensions law, as may be agreed upon by the employer of the person concerned and the relevant executing authority and approved by the Treasury.
- (3) (a) An officer or employee may with his or her consent and on such conditions, in addition to those prescribed by or under any law, as may be determined by the relevant executing authority after consultation with the Treasury, be placed at the disposal of another government, or of any council, institution or body established by or under any law, or of any other body or person, for a particular service or for a stated period.



- (b) Such an officer or employee remains subject to the laws applicable to officers and employees in the public service while so placed at such disposal.
- (4) (a) A person (in this paragraph referred to as the official) in the service of a department under any law other than this Act, or in the service of another government, or of any council, institution or body established by or under any law, or of any other body or person, may be employed by another department or a department, as the case may be, for a stated period and on such terms and conditions, other than conditions laid down by or under any pensions law, as may be agreed upon by the employer of the official and the relevant executing authority and approved by the Treasury, and in such a case, on such conditions, in addition to those prescribed by or under any law, as may be determined by the said authority after consultation with the Treasury, an officer or employee may with his or her consent and in terms of such an agreement be placed at the disposal of the employer of the official for the same period on an exchange basis.
  - (b) Such an officer or employee remains subject to the laws applicable to officers and employees in the public service while so placed at such disposal.

[S. 15 substituted by s. 12 of Act 47 of 1997.]

# CHAPTER V TERMINATION OF SERVICE (ss 16-17)

#### 16. RETIREMENT AND RETENTION OF SERVICES

(1) (a) Subject to the provisions of this section, an officer, other than a member of the services or an educator or a member of the Agency or the Service, shall have the right to retire from the public service, and shall be so retired, on the date when he or she attains the age of 65 years: Provided that a person who is an employee on the day immediately before the commencement of the Public Service Amendment Act, 1996, has the right to retire on reaching the retirement age or prescribed retirement date provided for in any other law applicable to him or her on that day.

[Para. (a) amended by s. 32 (1) of Act 38 of 1994 and substituted by s. 3 of Act 13 of 1996.]

- (b) If such an officer attains the said age after the first day of a month, he or she shall be deemed to have attained it on the first day of the following month.
- (2) (a) Notwithstanding the provisions of subsection (1), an officer or employee, other than a member of the services or an educator or a member of the Agency or the Service, employed with effect from a date prior to 1 October 1993 in terms of a law repealed by this Act, shall have the right to retire from the public service at or at any time after the retirement age applicable to him or her as at 1 October 1993, and that retirement age shall not be changed without his or her consent.



[Para. (a) amended by s. 32 (1) of Act 38 of 1994 and substituted by s. 13 (a) of Act 47 of 1997.]

- (b) An officer who has the right to an earlier retirement age in terms of paragraph (a), and who wishes to be so retired, shall give written notification to his or her head of department of his or her wish to be so retired, and he or she shall –
  - (i) if that notification is given at least three calendar months prior to the date on which he or she attains the retirement age applicable to him or her in terms of paragraph (a), be so retired on the date on which he or she attains that age or, if he or she attains it after the first day of a month, on the first day of the following month; or
  - (ii) if that notification is not given at least three calendar months prior to the date on which he or she attains the said age, be so retired on the first day of the fourth month after the month in which the notification is received.
- (c) (i) In the case of an officer who occupies the office of head of department, he or she shall give notification of his or her wish to be retired from the public service at least six calendar months prior to the date on which he or she attains the said age, and if he or she has so given notification, the provisions of paragraph (b) (i) apply mutatis mutandis.
  - (ii) If such an officer has not so given notification at least six calendar months prior to the date on which he or she attains the said age, he or she shall be so retired on the first day of the seventh month following the month in which that notification is received.
- 2A (a) Notwithstanding the provisions of subsections (1) and (2) (a), an officer, other than a member of the services or an educator or a member of the Agency or the Service, shall have the right to retire from the public service on the date on which he or she attains the age of 55 years, or on any date after that date.
  - (b) The provisions of subsection (2) (b) shall apply with the necessary changes to an officer who wishes to retire in terms of paragraph (a).

[Sub-s. (2A) inserted by s. 1 (a) of Act 67 of 1996.]

(3) (a) Subject to the provisions of this section and the terms and conditions of a contract contemplated in section 12 (2), an officer who occupies the office of head of department has the right to retire from the public service and he or she shall be so retired at the expiry of the term contemplated in section 12 (1) or (2), or of any extended term contemplated therein, as the case may be.

[Para. (a) substituted by s. 13 (b) of Act 47 of 1997 and by s. 9 (a) of Act 86 of 1998.]



- (b) If an officer retires or is retired in terms of paragraph (a), he or she shall be deemed to have been discharged from the public service in terms of section 17 (2) (b).
- (4) An officer, other than a member of the services or an educator or a member of the Agency or the Service who has reached the age of 60 years may, subject in every case to the approval of the relevant executing authority, be retired from the public service.

[Sub-s. (4) amended by s. 32 (1) of Act 38 of 1994 and substituted by s. 13 (c) of Act 47 of 1997.]

(5) (a) Subject to the terms and conditions of a contract contemplated in section 12 (2), an executing authority may, at the request of an officer occupying the office of head of department, allow him or her to retire from the public service before the expiry of the term contemplated in section 12 (1) or (2), or any extended term contemplated therein, and notwithstanding the absence of any reason for discharge in terms of section 17 (2) or the contract concluded with the officer, as the case may be, if a reason exists which the said authority deems sufficient.

[Para. (a) amended by s. 32 (1) of Act 38 of 1994 and substituted by s. 13 (d) of Act 47 of 1997 and by s. 9 (b) of Act 86 of 1998.]

# OBLIGATIONS, RIGHTS AND PRIVILEGES OF OFFICERS AND EMPLOYEES (ss 28-36)

# 28. RIGHTS AND OBLIGATIONS

An officer or employee shall fulfil the obligations imposed upon him by this Act or any other law, and he or she shall have the rights and may be granted the privileges which are prescribed by or under this Act or any other law.

# 29. SAVING REGARDING RIGHTS AND OBLIGATIONS

No provision of this Act shall be construed as abrogating or derogating from any existing, accruing or contingent right, liability or obligation of any person flowing from any other law.

#### 30. OTHER WORK BY OFFICERS AND EMPLOYEES

Unless it is otherwise provided for in his or her conditions of employment -

- (a) every officer and employee shall place the whole of his or her time at the disposal of the State;
- (b) no officer or employee shall perform or engage himself or herself to perform remunerative work outside his or her employment in the public service, without permission granted by the relevant executing authority or an officer authorised by the said authority; and

[Para. (b) substituted by s. 25 of Act 47 of 1997.]



(c) no officer or employee may claim any additional remuneration in respect of any official duty or work which he or she performs voluntarily or is required by a competent authority to perform.

# 31. UNAUTHORISED REMUNERATION

- (i) If any remuneration, allowance or other reward is received by an officer or employee in connection with the performance of his or her work in the public service otherwise than in accordance with the provisions of this Act or a determination of the Minister, or is received contrary to the provisions of section 30 (b), that officer or employee shall, subject to the provisions of subparagraph (iii), pay into revenue an amount equal to the amount of any such remuneration, allowance or reward or, where it does not consist of money, the value thereof as determined by the head of the department in which he or she was employed, or in which he or she is regarded to have been employed by virtue of the provisions of section 1 (3), at the time of the receipt thereof, and if he or she does not do so, it shall be recovered from him or her by the said head by way of legal proceedings or in such other manner as the Treasury may approve, and be paid into revenue.
  - (ii) The officer or employee concerned may appeal against the determination of the head of department to the relevant executing authority, who may make such decision as he or she may think fit.
  - (iii) The relevant executing authority may approve of the officer or employee concerned retaining the whole or a portion of the said remuneration, allowance or reward.

[Para. (a) substituted by s. 26 (a) of Act 47 of 1997.]

- (b) If in the opinion of the head of department mentioned in paragraph (a) an officer or employee has received any remuneration, allowance or other reward contemplated in that paragraph, and it is still in his or her possession or under his or her control or in the possession or under the control of any other person on his or her behalf, or, if it is money, has been deposited in any deposit-taking financial institution in his or her name or in the name of any other person on his or her behalf, that head of department may in writing require that officer or employee or that other person or that financial institution not to dispose thereof, or, if it is money, not to dispose of a corresponding sum of money, as the case may be, pending the outcome of any legal steps for the recovery of that remuneration, allowance or reward or the value thereof.
- (c) A person of the financial institution contemplated in paragraph (b) who or which fails to comply with a requirement in terms of that paragraph, shall be guilty of an offense and liable on conviction to a fine or to imprisonment for a period not exceeding one year.

- (d) The provisions of this section shall also apply to an officer who is a head of department, and in such a case a reference to a head of department shall be construed as a reference to the Treasury.
- (2) (a) Subject to the provisions of paragraph (b), any salary, allowance, fee, bonus or honorarium which may be payable in respect of the services of an officer or employee placed temporarily at the disposal of any other government, or of any council, institution, body or person contemplated in section 15 (3) or (4), shall be paid into revenue.
  - (b) In circumstances regarded by the relevant executing authority as exceptional, the said authority may approve of paying out of revenue an amount equal to that salary, allowance, fee, bonus or honorarium, or a portion thereof, to the officer or employee concerned.

[Sub-s. (2) substituted by s. 26 (b) of Act 47 of 1997.]

# (3) For the purposes of subsection (1) (a) (i) -

- (a) 'this Act' includes any law repealed by this Act;
- (b) 'determination of the Minister' includes any recommendation of the Public Service Commission established by section 209 (1) of the Constitution of the Republic of South Africa, 1993 (Act 200 of 1993), or of any commission for administration, public service commission or other like institution established by or under, or which functioned in accordance with, any such law; and
- (c) 'section 30 (b)' includes any corresponding provision of any such law.

[Sub-s. (3) added by s. 26 (c) of Act 47 of 1997.]

# 32. ASSIGNMENT OF OTHER FUNCTIONS TO OFFICERS AND EMPLOYEES

An executing authority or the head of a department, branch, office or institution may direct any officer or employee under his or her control temporarily to perform duties other than those ordinarily assigned to such an officer or employee or appropriate to the grade, designation or classification of his or her post, and he or she shall comply with such a direction.

# 33. CESSION OF EMOLUMENTS

No officer or employee shall without written approval of the accounting officer, as defined in section 1 of the Exchequer Act, 1975 (Act 66 of 1975), of the department or office in which he or she is employed, cede the right to the whole or any part of any salary or allowance payable to him or her.

# 34. REDUCTION OF SALARIES

The salary or scale of salary of an officer shall not be reduced without his or her consent except in terms of the provisions of section 13 (6) or 38 or of any collective agreement contemplated in section 18 (b) of the Public Service Laws Amendment Act, 1998, or of an Act of Parliament.



[S. 34 substituted by s. 27 of Act 47 of 1997 and by s. 11 of Act 86 of 1998.]

#### 35. GRIEVANCES OF OFFICERS AND EMPLOYEES

- (1) For the purposes of asserting his or her right to have his or her complaint or grievance concerning an official act or omission investigated and considered by the Commission, an officer or employee may lodge that complaint or grievance with the relevant executing authority under the prescribed circumstances, on the prescribed conditions and in the prescribed manner, and if that complaint or grievance is not resolved to the satisfaction of such an officer or employee, that executing authority shall submit the complaint or grievance to the Commission in the prescribed manner and at the prescribed time or within the prescribed period.
- (2) After the Commission has investigated and considered any such complaint or grievance, the Commission may recommend that the relevant executing authority acts in terms of a particular provision or particular provisions of this Act or any other law if, having regard to the circumstances of the case, the Commission considers it appropriate to make such a recommendation.
- (3) For the purposes of subsection (1), the powers conferred upon the Commission by section 11 of the Commission Act shall be deemed to include the power to make rules which are not inconsistent with the provisions of this section as to the investigation of complaints or grievances concerning official acts or omissions, and 'prescribed' means prescribed by the Commission by rule under the Commission Act.

[S. 35 substituted by s. 28 of Act 47 of 1997.]

# 36. POLITICAL RIGHTS OF OFFICERS AND EMPLOYEES

Subject to the provisions of section 20 (g), an officer or employee may -

- (a) be a member and serve on the management of a lawful political party;
- (b) attend a public political meeting, but may not preside or speak at such a meeting; and
- (c) not draw up or publish any writing or deliver a public speech to promote or prejudice the interests of any political party.

# CHAPTER VIII MISCELLANEOUS (ss 37-44)

# 37. REMUNERATION OF OFFICERS AND EMPLOYEES

(1) Subject to the provisions of section 5, officers and employees shall be paid the salaries, wages and allowances in accordance with the scales determined by the Minister for their ranks and grades in terms of section 3 (3) (c).

[Sub-s. (1) substituted by s. 29 (a) of Act 47 of 1997.]

# (2) Subject to such conditions as may be prescribed -

- (a) officers or employees or classes of officers or employees may on appointment, transfer or promotion be paid higher salaries or wages than the minimum amounts of the appropriate scales;
- (b) officers or employees or classes of officers or employees may be granted special advancement in salaries within the scales applicable to them;
- (c) the salary or wage of an officer or employee of exceptional ability or possessing special qualifications or who has rendered meritorious service, and, if it is in the interest of the public service, of any officer or employee, may be specially advanced within the scale applicable to him or her or may be paid a salary or wage in accordance with a higher scale or may be granted any other fitting reward; and

any special service benefit may be granted to a head of department or class of heads of department before or at the expiry of a term contemplated in section 12 (1) (a) or (b), or any extended term contemplated in section 12 (1) (c), or at the time of retirement or discharge from the public service.

[Sub-s. (2) amended by s. 29 (b) of Act 47 of 1997.]

# 38. WRONGLY GRANTED REMUNERATION

(1) If an incorrect salary or scale of salary on appointment, transfer or promotion, or an incorrect advancement of salary within the limits of the scale of salary applicable to his or her grading, was awarded or granted to an officer or employee, or was awarded or granted at the correct notch or scale but at a time when or in circumstances under which it should not have been awarded or granted to him or her, the head of the department in which that officer or employee is employed, shall correct his or her salary or scale of salary with effect from the date on which the incorrect salary, scale of salary or salary advancement commenced, notwithstanding the provisions of section 14 (3) (a) and notwithstanding the fact that the officer or employee concerned was unaware that an error had been made in the case where the correction amounts to a reduction of his or her scale of salary or salary.



- **SELF MANAGEMENT**
- (2) If an officer or employee contemplated in subsection (1) has in respect of his or her salary, including any portion of any allowance or other remuneration or any other benefit calculated on his or her basic salary or scale of salary or awarded to him or her by reason of his or her basic salary-
  - (a) been underpaid, an amount equal to the amount of the underpayment shall be paid to him or her, and that other benefit which he or she did not receive, shall be awarded to him or her as from a current date; or
  - (b) been overpaid or received any such other benefit not due to him or her
    - an amount equal to the amount of the overpayment shall be recovered from him or her by way of the deduction from his or her salary of such installments as the head of department, with the approval of the Treasury, may determine if he or she is in the service of the State, or, if he or she is not so in service, by way of deduction from any moneys owing to him or her by the State, or by way of legal proceedings, or partly in the former manner and party in the latter manner;

# 42. PUBLIC SERVICE STAFF CODE

- (1) Subject to the provisions of section 5 (4) -
  - (a) any standing determination of a general nature made by the Minister; and
  - (b) any directive by the Minister to elucidate or supplement any regulation,

and which is not inconsistent with this Act may be included in a code to be called the Public Service Staff Code.

[Sub-s. (1) substituted by s. 31 of Act 47 of 1997.]

- (2) The provisions of section 41 (2) shall apply mutatis mutandis in respect of the Public Service Staff Code.
- (3) The provisions of the Public Service Staff Code shall be binding upon any department, officer or employee in so far as they apply to that department, officer or employee.





# **ACKNOWLEDGMENTS**

The Department of Education in its aim to capacitate women managers commissioned KZM Management Consultancy to develop a training package for "Women In and Into Management and Leadership Positions."

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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



**SELF MANAGEMENT** 

# PREFACE: DEFINING STRATEGIC PLANNING AND LEADERSHIP

Debates about what comes first between leadership and strategic thinking are as old as the chicken or egg debates. This module deals with both issues due to their inter-relatedness. Section A of this module deals with strategic planning. Planning is often defined as a set of rational procedures and methods for decision-making consisting of several logical steps. A planning process is seen as containing a number of finite stages of logical progression.

The use of such words as "rational" and "logical" is often associated with perceptions of masculinity and it often excludes the perceived capacity of women to plan and participate meaningfully in any planning process. This stereotypical approach has created barriers for women's advancement into senior managerial positions.

This section moves from a premise that "a strategy is a unique and sustainable ways in which organisations create value". It provides aspects that differentiate operational planning from strategic planning and concludes by taking participants through practical steps in conducting both operational and strategic plans. Covered in this section are the following areas:

- Vision
- Mission
- · Strategic planning
- · Operational planning

Emphasis is put on the need to do all strategic planning exercises within the context of the overall strategic direction of DoE.

Section B of this module deals with leadership. In defining leadership, this module recognises that women are still tested and judged on the basis of their gender. This occurs despite the fact that they are getting stronger in the workplace, assert more leadership presence and are gaining more recognition as effective leaders.

The section also explores different styles, skills and types of leadership derived from literature that points out that women are significantly better leaders and are outpacing men in the following areas:

- Goal setting and setting clear direction.
- Ability to take charge in difficult situations.
- Setting high performance standards.
- Have better communication and social skills.

The module acknowledges the need for education to have effective leaders in order to meet its challenges. Education has an increasing desire for leadership that promotes collaboration, consensus building and the empowerment of others.

The module overall provides women managers with the tools they need to become more effective in their roles as strategic leaders.



# **EXPLANATORY NOTES:**

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FACILITATOR'S INPUT/NOTES

This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.



**HINTS** 

This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.



**ROLE-PLAY** 

This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who participated actively in the exercise.



**EXERCISE** 

This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.



**CASE STUDY** 

This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.



**SELF-TEST** 

This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.



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# INTRODUCTION

It is important to recognise that the transition in South Africa from a state of liberation struggle to a democratic government has, amongst other priorities, resulted in gender equality being placed on the national agenda.

One feature that requires further analysis is the innate difference in approach between women and men in organisational planning in general. In the field of education, both women and men continue to be appointed to management positions without being provided with training necessary to translate the vision of DoE into concrete programmes and practices.

The above is compounded by the different social roles allocated to women and men in society. These differing roles are characterised by unequal power relations and different needs and privileges. Gender roles underlie such roles, perpetuating the stereotype that "women are unable to plan rationally without being emotional about issues".

#### **BASIC ASSUMPTIONS**

Gender division of labour purports that women and men have different daily activities, responsibilities that are reflected in the allocation of their time to competing priorities. Despite this and the reproductive, productive and community facilitation roles that they have, women have to plan for every function that they perform.

Planning occurs at different educational levels and differs in terms of the distinctive requirements of each. At the national department level, for example, the planning required will be more strategic in nature than the operational planning aimed at managing a school. Leadership and strategic planning are intertwined, as good leaders are those that have a vision, and can persuade those they lead to buy into their vision.

Good leadership is premised on the ability to take others along in the strategic direction appropriate for the survival of the organisation.

#### **BROAD AIMS OF THE MODULE**

The module aims to enhance the skills of women managers and leaders in being able leaders who are able to provide leadership, while engaging in strategic and operational planning for their immediate areas of influence.

# **MODULE OUTCOMES**

Having worked through this module, women managers should be able to do the following:

- Develop a mission and vision for their immediate area of influence.
- Do a strategic planning in their own individual areas of influence.
- Translate the strategic plan into an operational plan.
- Understand the different levels of planning within education.
- Apply the concept of planning and strategic planning in their work.
- Understand the concept of leadership.
- Know the contemporary issues relating to women in leadership.
- Understand the dynamics of leader-follower interaction.
- Provide useful tools for the development of women in and into management positions.



**SECTION A: STRATEGIC PLANNING** 

# **UNIT 1:**

# STRATEGY IN RELATION TO VISION AND MISSION

# **OUTCOMES**

At the end of this unit, the participants should be able to use the mission and vision of DoF to:

- · Understand the connection between vision, mission and strategy.
- Facilitate the development of a vision for their immediate responsibility areas.
- Facilitate the development of a mission statement for their immediate areas of responsibility.

# WHAT IS MEANT BY STRATEGY?

A strategy represents unique and sustainable ways in which organisations create value. The key elements of strategy are:

- i. Vision
- ii. Mission
- iii. Core ideology
- iv. Translate these into strategic objectives
- v. Translated into action plans for the institution and its individual entities

# WHAT IS A VISION

A vision is a grand future purpose that:

- Describes future optimally functioning school, district office, provincial office, directorate at national, etc.
- Provides an overall direction or reason for existence.
- Motivates and can be used as marketing tool to attract learners and employees who fit into your culture.

A vision gives a quick glimpse of what you are trying to be – a brain that governs the whole body e.g." A school of choice in the FET band by year 201.0 "

The woman manager cannot facilitate the development of a vision in a vacuum. She has to be guided by the overall vision of DoE, as well as the vision of the provincial education department.



# **EXERCISE:**

What is the vision of DoE?
How does this relate to the vision of your provincial department?
now does this relate to the vision of your provincial department.

#### TYPES OF VISION STATEMENTS

There are a couple of ways in which a vision can be cast, namely:

- One goal, all encompassing vision, i.e. catchy, e.g.
  - "To be the leading district office in the province in terms of efficiency and effectiveness."
  - "To be the best school high school in the province as measured by the pass rate at matric."
- Sound bite vision, i.e. describes the desired future state, a world that you wish to create, e.g.
  - "To put education within reach of every person in South Africa."
  - Descriptive vision captures organisational purpose and articulates a goal that is not only understood but felt in the hearts, e.g.
  - Martin Luther King " I have a dream ..."

# TIPS FOR DEVELOPING A VISION

- Situate the vision of your establishment within the broader context of DoE /provincial department.
- Always make sure that the vision you have becomes "our vision" by consulting widely. This motivates
  - staff to work towards the achievement of the vision.
- The vision must be futuristic- this is something that the school/ district office or provincial office is striving toward.
- The vision you come up with should represent a mental picture that portrays a desirable state that sets your establishment apart from the rest.
- It has to force everyone to take calculated risks and to stretch targets?
- It should be powerful enough to propel the establishment to reach for new heights.



# WHAT IS A MISSION STATEMENT

Mission is a grand future purpose that provides reason for existence.

Picture the desired future, in other words, what would you like to see in your school/district office provincial office/directorate, etc. in 10 years to come.

# Characteristics of a good mission statement:

- Must be vivid and real.
- Communicates unrealised dreams, hopes and aspirations.
- Considers the priorities of your establishment in relation to core function

# **EXERCISE**

What is the vision of DoE?
What is the mission of your provincial department?
What is the mission of your directorate/district/school?

# UNIT 2:

# STRATEGIC PLANNING

# **OUTCOMES**

# After completing this module, participants should be able to:

- Appreciate the connection that should exist between the strategic plan of their immediate establishments with the strategic plan of DoE.
- Facilitate the drawing up of a strategic plan for their respective areas of responsibility.
- Understand and appreciate the broader context within which strategic planning occurs.

# The following describe the attributes of strategy:

- · Gives a sense of order.
- · Gives certainty.
- Improves effectiveness.
- Being efficient but also being effective.
- · Enhances efficiency.
- Analyses the environment.
- Influence the rules of education and education governance.

#### WHAT IS STRATEGY?

Without knowing where you are going, you will not know how to get there. Being without a strategy is like drifting from day to day without knowing what contribution each day's activity makes to the bigger picture.

- To anticipate the future and plan accordingly.
- To anticipate challenges and plan to overcome them.
- Prepare to deliver well on your core business.
- To enhance customer satisfaction i.e. to satisfy the needs of the learners, the DoE and the human resource needs of the country.

# WHY A STRATEGY?

# There is a constant need within the department to react and respond to:

- The shifting external environment.
- · New technologies.
- Learner preferences.
- Political and regulatory changes.
- New windows of opportunity for learning and educating.
- Any other presenting crisis.

#### Strategic planning will provide:

- A framework for action for managers to assess progress in a commonly agreed upon direction
- A blueprint for allocating resources according to priority areas.
- A common thread that binds the National Department of Education, its provincial department, regional and district offices and governing bodies at schools to pull in one direction.



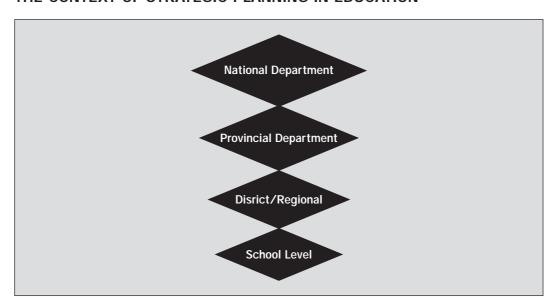
- A better understanding of how activities fit together and how different sections/directorates influence one another.
- A sense of direction that motivates managers and other employees to do their work well.

# WHAT IS A STRATEGIC PLAN?

A strategic plan is a systematic process composed of deliberate actions to craft a future for an organisation.

Strategic planning is a process that translates vision and values into measurable and practical outcomes.

# THE CONTEXT OF STRATEGIC PLANNING IN EDUCATION



It is extremely important for women managers to understand dynamics that relate to strategic planning. Education is a public enterprise and as such, a woman manager at a district or even school level cannot engage in strategic planning without aligning with the provincial strategic direction which is in turn, informed by the strategic direction of the National Department. The lines responsibility and accountability when it comes to strategic planning are clearly demarcated, as in:

# **CORPORATE STRATEGY**

Corporate strategy in education is driven at ministerial level, and is aimed at ensuring efficiency and high performance within the Department by:

Ensuring that the Department provides efficient and effective service delivery through:

- Reinforcing the Department's strengths.
- Coordinating synergy of different directorates within the national office and the provinces.
- Establishing service provision strategies.
- Foreseeing and planning for the allocation and management of resources.
- Reviewing and revising major strategic approaches and moves.

#### **BUSINESS STRATEGY**

The business strategy is driven at Provincial level by MEC for education. This process links the provincial strategic objectives to the National strategic initiatives. It ensures that provinces take action to address provincial specific issues and report periodically to the National Department of Education on progress.

#### DISTRICT OR REGIONAL STRATEGIC PLANS

This cascades from the provincial plan to ensure that the district plan links directly with provincial strategies. The basic approach is to achieve provincial objectives while considering local dynamics. Reviewing and revising district activities and aligning them to the provincial strategic imperatives is a key component of this level.

District or regional strategies are driven by district or regional managers and these are informed by the provincial strategic direction

#### SCHOOL LEVEL STRATEGIES

The School Governing Body (SGB) is empowered to develop the vision and mission of public school establishments. Subject to the Act, the governing body of a public school must:

- Promote the best interests of the school and strive to ensure its development through the provision of quality education for all learners at the school.
- Adopt a Constitution.
- Develop the mission statement of the school.
- Adopt a code of conduct for learners at the school.

The strategic planning at school level is governed by the precepts of the South African Schools Act.

#### **EXERCISE**

Identify issues that would be typically covered in the strategic plan of a school.
Identify role players who should be part of a strategic plan at school level.



**SELF MANAGEMENT** 

#### **KEY ISSUES IN STRATEGIC STEPS**

#### **Environmental Scan both internal and external**

In drawing up a strategic plan, the woman manager in education has to consider a variety of factors, viz.

What is happening in the country/province/region?

- Major changes (cf. National Policy changes; new priorities e.g. The African Renaissance);
- How are these changes forcing you and your establishment to adapt?
- Who is your customer?
- · What are customer needs that you are seeking to satisfy?
- Who is your competitor?

#### Why do environmental scanning?

It is important to know what is happening in the environment that impacts on strategic planning. This applies to social factors

such as demographics. One pertinent factor affecting education provisioning is the changing demographics in South African schools.

This is a crucial factor deserving consideration at all levels of strategic planning. The impact of this at school level depends on whether

the school is historically well resourced or under-resourced.

#### Other macro environmental factors deserving consideration are:

- Technology, economic factors, and political factors.
- Trends in the field of education.
- The mushrooming of private providers of education and the increase in the parental involvement in education.
- Internal environment within the DoE such as structure, history, strengths and weaknesses.
- How other government departments relate to education and the impact this has on strategic planning at national, provincial, district and school level.

#### **SWOT ANALYSIS**

SWOT stands for strengths, weaknesses opportunities and strengths

**Strengths:** areas in which your school, district office, provincial office or national directorate is doing well, e.g. well-qualified dedicated staff/ good facilities and equipment, etc.

**Weaknesses**: areas that need improvement due to current poor levels of performance, e.g. lack of safety at schools, poor attendance rates by learners during certain periods.

**Opportunities:** areas that can be tapped due to new developments in the education arena or external environment e.g. the erection of a low income houses can present an opportunity for a school with dwindling learner enrolment.

**Threats:** areas/factors that pose a challenge e.g. the increase in the number of private schools or private schools recruiting good educators away from public schools.

Doing a SWOT is crucial because "Where you are determines how far you can go."

#### **EXERCISE**

In preparing to do a strategic plan you have to consider your current situation in terms of strengths. weaknesses, opportunities and threats Do a SWOT analysis for your immediate work environment i.e. be it your school, district office, provincial office etc.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Refer to your SWOT, and identify the direction that your school, directorate, district or provincial office would need to take in order to minimise the weaknesses and deal with the threats.

	YES/NO	PRIORITY RATING (1= most important)
Do you want to increase learner enrolment?		
Do you want to improve learner pass rates?		
Do you want to improve staff morale?		
Do you want to enhance financial viability of your school		
Do you want to reduce gangsterism in your school?		
Do you want to improve staff morale		

You cannot do everything at the same time. This forces you to prioritise.

#### THE STRATEGIC PLANNING PROCESS

A strategic plan can only be successfully implemented if all the role players feel they own it. This necessitates that women managers be cautious of how they do strategic planning.

#### PRACTICAL CONSIDERATIONS

When a woman manager engages in strategic planning, this should not be treated as an ego-tripping exercise. The actual role of a woman manager at whatever level is to:

- Harness the school, district, region, province, national directorate in one direction.
- Adopt an inclusive approach without including too many role players to paralyse the process.
- Involve the Representative Council of Learners, especially if you are in a high school setting, as learners are the important stakeholders.
- Involve organised labour.
- Get the commitment of all key role players by involving them right from the beginning.

#### **EXERCISE**

Identify the macro aspects that impact on planning at national, provincial, district and school level. Explain in what way

MACRO ENVIRONMENT	IDENTIFIED ASPECT	HOW IT AFFECTS STRATEGIC PLANNING

#### PREPARATION FOR STRATEGIC PLANNING

Prior to the start of the actual planning process, do some thorough preparation.

Do not rush into actual planning process without first clarifying the expectations held by all stakeholders in education and the different levels of planning.

Make sure you have a reasonable understanding of the strategic direction as determined by the office to which your establishment reports. For example, it would be an exercise in futility if any district office embarked on a strategic planning process without being guided by regional strategic imperatives.

Ensure that the key players are willing to invest effort into the planning process.





Imagine that your school has no strategic plan and initiate the first step toward developing one. Start by asking yourself the following questions and answer on the sheet provided:

How much commitment is there to the planning process?
Who should be involved?
What needs to be done to ensure that all stakeholders are involved?
How long will the planning take?
What information is needed to plan successfully?
Who will gather the necessary information?

Situate strategic planning against the backdrop of values in education (See Women and the Law Module for a detailed description of values in education).

# HOW TO CONDUCT A STRATEGIC PLANNING SESSION

#### Establish rapport and outline the process

- Crucial at this stage is getting buy-in of all important role players.
- Build trust and confidence.
- Ensure that all important role players are involved.
- Outline the process.
- · Invite participant comments and consider these seriously.
- Obtain and use the strategic plan of an office that you report to as a framework.

#### Consider existing strengths

Consider the existing strengths you need to build on, e.g. disciplined staff and learners, good infrastructure, etc.

#### Consider existing weaknesses

In order to reach your desired destination you need to improve on your weaknesses.

#### Identify existing and new opportunities

- Identify those issues that are crucial to the desired growth and expansion.
- Consider the openness of corporate South Africa to investing in education.
- Your list should contain those things that are crucial to growth and sustainability of education.

#### Identify existing threats

It does not help much to plan if the plan does not accommodate existing threats. For instance, without accounting for the threat arising out of HIV/AIDS amongst both learners and educators, even the grandest of plans will not reach fruition. Consider the threats that are:

- · Socio-economic in origin such as poverty.
- Regional nuances, e.g. circumcision.
- Political threats.
- Cultural in origin, e.g. female learners being expected to exit the schooling system sooner than male learners.

#### Identify strategic objectives

These represent concrete achievable things that you need to do in order to grow.

#### Examples of strategic objectives for school level:

- Improve nutritional status of learners from impoverished homes.
- Provide sex education to curb teenage pregnancy and HIV infection.
- Improve the Matric pass rate by 10%.
- To reduce the drop-out rate by 15%.

#### Example of strategic objectives for regional level:

- Improve communication with schools by holding monthly meetings.
- Improve employee relations by involving unions in all matters affecting the employees.
- To establish partnerships with local tertiary institutions.

# Convert the strategic objectives into action plans

Left unpacked, all these are good ideas that need to be converted into concrete actions underlined by the following:

- · Clear lines of responsibility.
- Defined time frames.
- Identification of resources needed.
- Intended outcomes.



# **EXAMPLE OF PRACTICAL STRATEGIC PLANNING EXERCISE**

PERFORMANCE INDICATOR	Improved nutritional status of learners in school x.							At least 15% increase in matric pass rate				
ООТРОТ	Distribution of food at least twice a week							Improved levels of attendance and time in task by both learners and educators				
RESOURCES NEEDED	Time							Time	Staff time			
TIME FRAME	September 2003				October 2003	January 2004 – ongo- ing	January 2004 – ongoing	January 2004	Start January 2004 - ongoing	Start January 2004 – ongoing	Start January 2004 - ongoing	Start Jan 2004
RESPONSIBLE OFFICE	Guidance HoD and principal					Representative Council of learners/Guidance teachers	HoD-Guidance	Principal	Co-ordinated byh prin- cipal and implement- ed by HoD's	School Management Team under the guid- ance of principal	HoD Guidance togeth- er with subject area HoDs	Initiated by principal and RCL and imple- mented by all
ACTIONS	1.1 Write a proposal	1.2 Identify supermarkets in the area	1.3 Make appoint- ments and present the proposal	1.4 Come up with criteria for inclusion of learners in the nutritional programme	1.5 Put infrastructure in place to distribute donated food to target learners	1.6 Distribute received food	1.7 Monitor the programme	2.1 Ensure timely delivery of stationery and books	2.2 Introduce supervised study sessions	2.3 Reward and recognise good performance by educators	2.4 Introduce a top achiever recognition system	2.5 Adopt a zero tolerance policy for disruptions
STRATEGIC OBJECTIVE	Distribute food parcels to learners from destitute families twice a week starting Jan 2004.	2.1 15% increase in the matric pass rate by end of 2003						2,1 15% increase in the matric pass rate by end of 2003				
GOAL	In Improve learner concentration by reducing hunger							2. Improve matric results				

#### **EXERCISE**

After getting a sense of the process, identify at least three strategic objectives that are relevant to your area of work and take those through the planning process.

GOAL	STRATEGIC OBJECTIVE	ACTIONS	RESPONSIBLE OFFICE	TIME FRAME	RESOURCES NEEDED	OUTPUT	PERFORMANCE INDICATOR

#### Link your plan to the budget

Your budget should reflect your strategic priorities. Otherwise, strategic planning remains an academic exercise.

Allocate resources for your strategic plan to get off the ground. Unless you allocate identified needed resources, the implementation of the plan is impossible. Require each unit/directorate/department to generate their operational plans based on the master strategic plan.

#### THE ROLE OF WOMEN MANAGERS AND LEADERS IN STRATEGIC PLANNING

Strategic planning is obviously a process and not an event. Strategic planning is also a team exercise rather than an individual exercise. As such, women managers have the benefit of having a natural inclination towards teamwork. Lack of past exposure to strategic planning by women should not detract from the significance of this exercise. Women need to seek opportunities in which they can improve their strategic planning skills even if it is by merely observing strategic planning sessions elsewhere. As a skill, strategic planning will be perfected through practice and the more exposed women managers are to this process, the better they will become.

At a school level, the SGB has a legal responsibility in the area of strategic planning. However, women managers have a crucial role to play in:

- Facilitating the gathering of the necessary information for planning.
- Providing support in revising strategic plans.
- Co-ordinating review and approval process.
- Crystallising strategic issues to be addressed.
- Establishing annual review cycles.
- Developing strategy performance assessments.



# **UNIT 3:**

# OPFRATIONAL PLANNING

#### **OUTCOMES**

At the end of the unit, the participants should be able to:

- Understand and apply operational planning within the context of education.
- Plan in a purposeful manner.
- Link planning to educational performance.

#### WHAT IS OPERATIONAL PLANNING?

Planning includes defining goals, establishing strategy and developing plans to coordinate activities. Planning is a management function that is often used to facilitate coordination. This implies that you, as a woman manager, have the responsibility to coordinate your subordinates' functions. Planning provides an efficient way for you to combine the talents and experiences of educators under your management.

Planning involves the ability to organise work properly. Planning is about seriously considering:

- · What is to be done?
- · What are the means of doing it?
- When is it to be done?
- Who is to do it?

Knowing what planning is in general, brings us to an understanding of what an operating plan is:

An operational plan is concerned with managing and coordinating activities at a level lower than strategic planning. That is, an operational strategy deals with activities derived from the translation of vision and mission at the school level. In other words, an operational plan translates the strategy into day-to-day planned activities, thereby contributing to the achievement of the overall strategy. This then would involve activities such as:

- How to ensure that the school is run efficiently?
- · How are the school funds going to be raised?
- How many educators are required at the school?
- How are learners to be taught?
- · How to involve parents in school activities?
- How to maintain the school's assets?

Imagine you are district official and your district is constantly behind schedule in making submissions to the regional office. Consequently you have earned the wrath of the regional officials.

Plan to make this year a better one in terms of doing high quality work timeously.



OBJECTIVES:	
TASKS:	
ACTIVITIES:	
REQUIRED RESOURCES:	
TARGET DATE:	

# WHAT IS THE PURPOSE OF OPERATIONAL PLANNING?

- An operational plan gives direction. The plan forces a clearer definition of what the school tries to achieve and to be.
- It reduces waste because every activity and all the resources used can be accounted for
- An operational plan sets new standards for control.
- Planning is an effective communication tool. It contains a written account of what is important at the school.
- Planning encourages the better use of time at all levels.
- Planning facilitates the attraction and retention of capable educators.
- In cases of changes in role players, it allows the new role player to know exactly where things are.

#### TYPES OF PLANS

Define and facilitate a discussion around each type of plan.

Iden	Identify issues that would be typically covered under each type of plan and give examples.					
	TYPE OF PLAN	ISSUE	EXAMPLE			
1	Specific plans					
2	Directional plans					
3	Long-term plans					
4	Short-term plans					
5	Single-use plans					
6	Multi-use plans					

# **SECTION B: LEADERSHIP**

#### THE DIFFERENCE BETWEEN A BOSS AND A LEADER:

A boss says: "Go! - a leader, says "Let's go!"

#### INTRODUCTION

There are increasing attempts to create equity in the conditions, opportunities and remuneration of men and women. However according to the National Gender Policy Framework (2001, p18.), 'there is still a long way to go before institutional power is shared equally between women and men in the governmental and corporate sectors.

Although men and women are said to be able to make equally valuable contributions to organisations as leaders and managers, gender stereotypes and the subordination of women continues. Privately, leadership skills are often perceived to belong to men only. Developing such skills is essential for women in and aspiring to management and leadership positions. The acquisition of such skills is essential to developing, guiding and controlling the education environment in the face of enormous complexity.

Although this leadership module is generic to a large extent and can be applied to both men and women, attempts have been made to relate most aspects to women leaders specifically.

#### **BROAD AIMS OF THIS SECTION**

Having complied with the requirements of the module, participants should:

- Understand issues around leadership as they relate to women managers.
- Apply the power and influence bases by being effective leaders.
- Apply change management knowledge and skills in executing their managerial functions.



# **UNIT 4:**

#### LEADING OTHERS IN TODAY'S EDUCATION ENVIRONMENT

#### **OUTCOMES**

Having completed the unit, you should:

- Understand the concept of leadership.
- Know the contemporary issues relating to women in leadership.
- Know the different leadership styles.
- Get insight into Leader-Follower-Situation Interactions.
- Provide tools for the development of women in and into management and leadership positions.

#### WHAT IS LEADERSHIP?

Leadership is the ability to influence any group towards the achievement of identified goals. Not all leaders are managers nor are all managers leaders. Leadership attributes include facilitating the following:

- Crafting a vision for followers.
- Articulating how the vision may be realised.
- Influencing and steering groups towards accomplishing goals.
- · Creating desirable opportunities.
- Directing and coordinating activities.
- Motivating a directive force of morale.
- · Creating conditions for the team to be effective.
- Inducing followers to behave in a desired manner.

#### LEADERSHIP IN RELATION TO MANAGEMENT AND ADMINISTRATION

The two concepts are often confused. One can manage without leading. 'Leadership' means taking charge, giving direction, and having followers and this requires a vision. To 'manage' is to control the administration of affairs, while to 'administer' is to perform the tasks. In a transforming environment the ability to manage is not enough: leadership becomes an essential ingredient for success.

The translation of departmental directives into concrete actions at school level, district office, regional office, provincial office and even directorate level in the Department of Education requires leadership. Given the definition of leadership covered above, list the leadership roles you have played in the recent past and indicate concrete activities in which you engaged in an attempt to effectively lead or play a leadership role in your school environment.



MANAGEMENT	LEADERSHIP
More concerned about "keeping the engine running"	Crafts a vision for follower
Bestowed by position	Human quality that is not guaranteed by holding any position.
Often focuses on implementation of rules and regulations	Ability to see the bigger picture and steer the organisation in the right direction
Maintain discipline and control	Inspire followers
Control and direct others	Motivate others
Monitoring, filtering and disseminating information	Promotes two-way communication
Allocation of resources according to strategic direction	Allocation of resources according to strategic direction
Can happen in the absence of vision	Requires vision

#### TASKS OF A LEADER IN THE FIELD OF EDUCATION

An educational leader has the responsibility for:

- Providing inspiration and vision to the school/district office/regional office/provincial office or national office.
- Facilitating the establishment of an effective School Governing Body (SGB).
- Enhancing the quality of learning at school.
- Supporting educators who deliver learning.
- Creating a climate in which commitment is high.
- Facilitating the articulation of the school's vision.
- Defining the school's values and ensuring that those values are entrenched by all stakeholders such as learners, parents and the community within which the school operates.

The translation of departmental directives into concrete actions at school level, district office, provincial office or even directorate level in the Department of Education requires leadership. Given the definition of leadership covered above, list the leadership roles you have played in recent years, and indicate the skills that you needed to lead effectively.

#### VALUES IN THE FIELD OF EDUCATION

The schooling system is responsible, among other things, for the inculcation of values, habits and attitude through the hidden curriculum. Refer to the Women and the Law Module for a detailed discussion of values in education. An effective leader leads by example and as such is a moral leader.

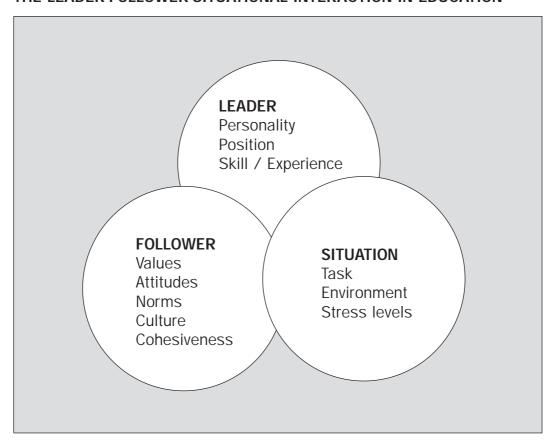
#### What are morals?

The Penguin Dictionary of Psychology defines morals as "a pertaining to laws or customs governing conduct / characterising a person or group whose conduct is proper and ethical. The principal, through the SGB in a school situation, facilitates the development of a Code of Conduct for learners. The Educators on the other hand, have to abide by the Code of Conduct set by the Department through CASE. In order to be able to enforce moral behaviour, the leader must have an impeccable record of moral behaviours.

# LEADERSHIP IN THE CONTEXT OF THE DOE'S SCHOOL EFFECTIVENESS PROGRAMME

At school level, educational leadership is about ensuring that learning occurs within an efficiently run school. A school's effectiveness in fostering learning is a core issue in school governance. It is dependent on the values, commitment, decision-making style and leadership skills of the leader.

#### THE LEADER-FOLLOWER-SITUATIONAL INTERACTION IN EDUCATION



#### **LEADER**

Effective leadership depends on the interaction of the following dynamics:

**Leader Personality:** this has to do with the ways in which the leader customarily acts and reacts to any given situation. Leaders with an inclination to cooperate and consult are often more successful than those who are inclined to force their wishes on followers.

**Position:** although anybody can be a leader, in hierarchical organisations like the Department of Education, positions and ranks do matter. An idea expressed by a leader backed by position of authority is more likely to be taken seriously than the same idea coming from an individual of lower rank.

**Skills and experience:** leadership skills tend to be enhanced by experience and knowledge, and followers are attracted to leaders who can give guidance and support in times of need. Women managers with minimal experience need to seek opportunities to get exposed to enriching experiences in order to develop their leadership potential, and become generally knowledgeable in order to perform the task of guiding that comes with leadership.

#### **FOLLOWER**

We have all been exposed to people with good ideas but no followers. Whether or not the leader will be able to attract followers depends on:

**Values:** followers are attracted to leaders who hold the same set of values as they do. In education, the values of DoE should be the glue that holds leaders and followers together, in addition to the democratic values that South Africa as society cherish.

**Attitude:** leaders are more likely to be successful if they exude a positive attitude rather than if they are grumpy and complaining all the time. Followers look for leaders who display a positive attitude.

**Norms:** leaders who project acceptable standards of behaviour and conduct are actually able to lead. For example, the more similar the norms of the leader and the follower are, the more synergy they tend to have.

**Cohesiveness:** followers are attracted to leaders who make the followers feel that they are part of the action. Women leaders should therefore guard against encouraging cliques.

**Situation:** even people with good leadership qualities do not consistently act and react in the same way. Leadership is also determined by the situation or circumstances. Pertinent to analysing the situation are variables such as:

**Task**: this refers to the complexity of the task, with simple task being relatively easy to do and complex tasks requiring a greater degree of knowledge and guidance from the leader, and eliciting a higher degree of dependence on the leader by the followers.

**Environment:** this relates to the physical environment in terms of availability of facilities and equipment to get the job done. If the environment is conducive, the leader has a lesser motivational role to play than if the environment is not conducive.



**Stress levels:** this relates to the psychological well being of both the leader and the followers. If stress levels are high maybe due to stringent deadlines/ absence of a conducive environment the woman leader has not only to take care of her own stress but also guide others to deal with the stress, while getting the job done. There is a bigger demand on a leader in times of stress in terms of guiding, coaching, mentoring and even counselling subordinates.

From the discussion of the various variables involved in leader-follower interaction it becomes clear that leadership is a result of a complex set of interactions between the leader, the followers and the situation. Leadership is a process. The fact that a leader leads implies that there is a following to her/his leadership. A leader cannot be a leader without followers.

In this interaction, the follower recognises the right of the leader to exercise her/his authority and follows, not only on the basis of the authority bestowed by position, but also on belief in the leader's ability to offer guidance. The follower also observes when the leader practices what she/he preaches.

Leadership occurs within a particular situation. Within the context of this module, the situation refers to an education setting.

EXAMINE THE INTERACTION BETWEEN THE LEADER, FOLLOWERS AND SITUATION IN RELATION TO YOUR OFFICE OR SCHOOL:				
Do you believe you are an effective leader and why?				
How do you affect your followers?				
How are your followers affecting you?				
In what way is the situation in which you operate hampering your actions as a leader?				
In what way is the situation in which you operate facilitating or enhancing your leadership actions?				
How can you change different aspects of the situation in order to be effective?				

#### THE MULTIPLICITY OF ROLES PLAYED BY WOMEN MANAGERS

Women in leadership positions are not exempted from playing roles that are typical of women in general. In addition to leadership roles, women are still expected to play the following roles:

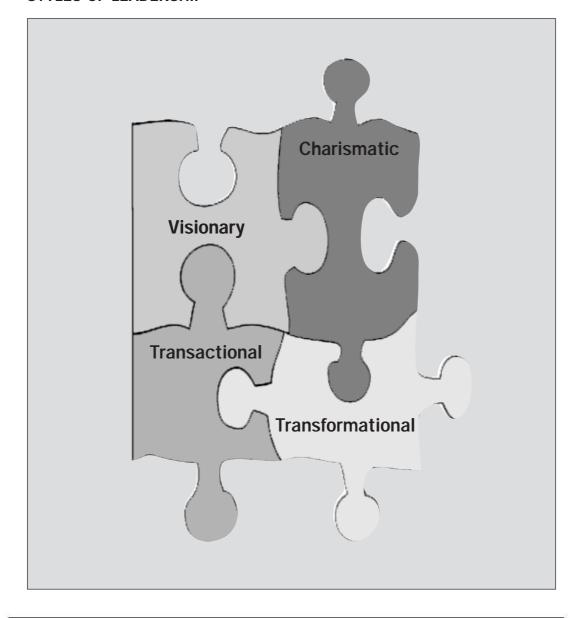
- The reproductive role of child bearing and rearing.
- The productive role. Women leaders in education are involved in such activities as educating to earn a living.



- Community development roles. Women become part of their communities and are involved in community building activities.
- The professional role. In education women leaders have their education competencies that set them aside as professionals.
- A management role. Women leaders have to plan, organise and control within a school and a broader education setting.
- · Leadership role both at home and at work.

It is owing to this multiplicity of roles that most women educators choose to stay in teaching rather than become educational managers or further explore their leadership potential.

#### STYLES OF LEADERSHIP





#### There are many different leadership styles, the following being the most common

#### Visionary leadership

The visionary leadership style is the ability to craft and create an attractive and appealing vision, which you persuade followers to embrace as their vision. You are required to facilitate and assist SGB s to develop a vision statement linked to the needs of the learners. The ability to articulate a realistic vision that will impact upon the current situation characterises a good visionary leadership style.

#### Charismatic leadership

This type of leader is said to possess qualities or powers that set him/her apart from ordinary beings. They appeal to their followers without saying a word! A charismatic leader can continue to be a leader without any substance. In this way the personality of the individual appeals to the followers in a manner that can downplay all other follower/situation variables.

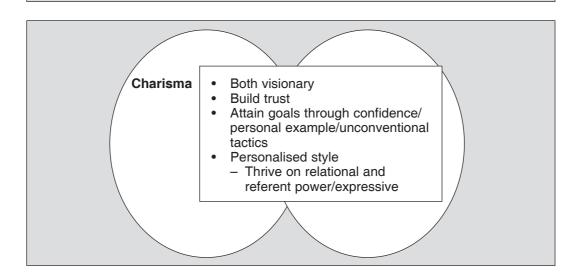
#### Transactional leadership

This relates to an exchange process in which people invest in the relationship for only as long as it is beneficial to them. In a work environment the followers continue to follow as long as the system requires them to follow rules regulations procedures etc. often without understanding the bigger pictures. Such leaders appeal to followers only to the extent that they fulfil a particular need of the followers e.g. appraise the follower performance favourably at the end of the year.

#### Transformational leadership

Transformational leadership is characterised by innovation. It Appeals to followers' values and their sense of higher purpose. All transformational leaders are charismatic. Not all charismatic leaders are transformational.

Keep in mind that at any given time, a leader will take certain actions based on his/her understanding of the leader's needs, the follower dynamics as well as the situation. Hence, in reality, the integrated leadership style is more common.



#### Transformational and transactional leadership

A combination of transformational and transactional leadership styles focus on good visioning. The combination of both allows the positive aspects of charismatic leadership to combine with setting goals and rewarding of desired performance.

**Transactional leadership** describes the interaction and contract made between the leader and the follower, typical of the work situation, where there are defined roles, responsibilities and rewards attached thereto.

A transformational leader takes the followers along and solicits their buy-in. This type of leader ensures that there is commitment of followers to the leadership process.

#### LEADERSHIP ISSUES RELATING TO WOMEN

#### The glass ceiling phenomenon

What is the glass ceiling phenomenon?

Glass ceiling is defined as '[a] barrier to women that exists in most organisations and consists of a complex web of management myths and values which suggest that women are not fit for senior jobs'. Blum (1994).

This relates to an invisible barrier that prevents women from advancing beyond certain levels. For example, how many women are Provincial Heads of Department in Education? Is there a logical reason for women to fail to advance to these levels or is it a matter of perceptions about what women can and cannot do?

#### Therefore, a glass ceiling is:

- A barrier to the occupational advancement of women caused by their gender.
- Based on stereotypes and wrong perceptions about women's inability to lead.
- Complex and not easy to deal with.
- Intangible and cannot easily be identified.

Is the glass ceiling real in the sense that you have experienced or are experiencing it? Or is the glass ceiling imaginary? When you get there will you realise that it does not exist.

Ms X applied for the position of Superintendent-General for Province Y. She went through the preliminary screening and was invited for interviews. Although Ms X is known to be a very bright individual with brilliant ideas, she has a track record of tardiness, missing deadlines and is also known to be argumentative and stubborn. She did not get the post.

Analyse this situation and determine whether the selection panel, many of whom she is known to, made a decision based on the glass ceiling phenomenon or the merits of the applicant.



#### Gender

Do men and women lead differently? Women tend to have a democratic style. They:

- Encourage participation and this leads to perceptions of indecisiveness.
- Share power and information.
- Enhance the self--worth of followers.
- Lead through inclusion.
- Rely on charisma, expertise, contacts and interpersonal skills.

Men on the other hand tend to have a directive style and rely on the formal authority of their position.

#### LEADING THROUGH EMPOWERMENT

Women leaders tend to embrace empowerment. They tend to put followers in charge of what they do.

#### They empower through:

- Showing trust.
- Providing vision.
- Removing barriers and offering encouragement.
- · Motivating.
- · Coaching leadership.

The participative approach introduced by the Department of Education School Effectiveness Programme has empowered the School Governing Bodies (SGB s) to govern schools effectively. This implies that School Governing Bodies have attained an increased level of independence resulting in greater responsibility for schools. This creates opportunities in education for different types of leadership to emerge.

Look at the general characteristics of the leadership styles of men and women. Which of these two styles characterises your own leadership style? Using the Table below, enter the first 5 words that come to your mind as descriptive of your own leadership style. Determine whether each word is typically considered to be a masculine or feminine leadership characteristic.

WORDS THAT BEST DESCRIBE YOUR LEADERSHIP STYLE	IS THIS STYLE TYPICALLY THAT OF MEN OR WOMEN

Is your style overall typically feminine, masculine, or androgynous, i.e. combines both male and female tendencies?



#### **MANAGEMENT SKILLS**

There are considered aspects of leadership. The following table indicates the skills required for leadership roles. Which best describes your style?

- Delegating.
- · Managing conflict.
- · Negotiation.
- · Problem solving.
- · Promoting creativity.
- Managing performance.
- Building high performing teams.
- Planning for development.
- · Coaching.
- Empowerment.

# INGREDIENTS FOR EFFECTIVE LEADERSHIP AND MANAGEMENT

CATEGORY	WHAT YOU CAN DO TO DEVELOP THE SKILL
Learning from experience	Stretch your behaviour a bit beyond your comfort zone to learn - get involved in activities that go beyond your job description
Listening	Demonstrate non-verbally that you are listening. Actively interpret the sender's message. Attend to the sender's nonverbal cues.
Building technical competence	Determine how your job contributes to the overall mission of the Department Become an expert in your job. Seek opportunities to broaden your expertise and knowledge.
Build effective relationships with your boss	Understand your boss's world. Adapt to your boss's style where possible and desirable.
Build effective relationships with your peers	Influence without authority.
Set goals for yourself	Your goals must be challenging yet attainable. Your goals must be concrete. Your goals must elicit your full commitment
Reward	Reward yourself for achieving your goals.
Strive for results	Adopt a result-oriented approach to life.
Coaching and mentoring	Coach others whenever you can help. Seek opportunities to be coached in order to grow professionally.



# CHALLENGES TO LEADERS AND MANAGERS IN THE FIELD OF EDUCATION

#### The ever-changing workforce

There is a continuous change in the composition of new entrants in the work environment. Women leaders have to deal with this ever-changing work force and learner demographics.

# More families having dual earners

More mothers and fathers are combining the responsibilities of parenting with work demands. Female leaders are increasingly experiencing difficulty in balancing work and family obligations.

#### More single parent families

There has been a dramatic increase in the number of female headed households.

#### **Diversity**

Leaders have to increasingly deal with a collective mixture of differences and similarities that are based on gender, race, sexual preferences, religion, etc. Diversity is part and parcel of the increasing pace of change in our lives. Women leaders and leaders in general are coming into increasing contact with workers who think and act like they do.

#### Globalisation

Globalisation impacts on leadership. It has created a need to find alternative ways to organise work and communicate with the workforce.

#### The Information Age

- Internet access
- · E-mail communication
- Virtual offices
- E-education

These are the challenges requiring women in leadership positions to be ahead of computer developments.

To keep abreast of all these developments that directly influence their leadership role, women managers have to read widely as they cannot afford to be overtaken by events.

Divide the group into smaller groups and assign them a set of challenges. Each group should brainstorm around the ways in which women leaders can deal with the challenges that face them.



# **UNIT** 5:

# **POWER AND INFLUENCE**

#### **OUTCOMES**

Having completed this unit, participants should be able to:

- Define power and influence.
- Understand where power comes from.
- Know about power and influence tactics and how best to apply them.
- Have a set of power tools to choose from for application in their work situation.

#### **DEFINING POWER AND INFLUENCE**

WHAT IS POWER?	WHAT IS INFLUENCE?
Capacity to affect others.	Leads to change in a person's attitude, beliefs or behaviour as a result of influence tactics.
Potential to influence others.	The degree of actual change targets a person's attitudes, values, beliefs or behaviour
Power does not need to be exercised in order to have influence.	Influence can be measured by the behaviour or attitudes manifested.
Capacity to influence can often bring about intended effects.	

#### **DISCUSSION**

What power do you have as a woman leader? What influence do you have? What is the basis of your power and influence?

Although power and influence use similar tactics in some instances, they differ in others.

Power is the potential or capacity to influence others.

Influence refers to the actual behaviour used by a person to change attitudes, opinions and behaviour of others.

# POWER AND INFLUENCE TACTICS

Ways in which people translate power bases and influence into specific actions.

POWER TACTICS	INFLUENCE TACTICS
<b>Reason:</b> Use of facts and data to make a logical or rational presentation of ideas.	Rational persuasion: When a person uses logical arguments or facts to influence others.
Friendliness: Use of flattery.	Inspirational appeals: When a person makes request that will make others emotional or enthusiastic.
Creation of goodwill.	Coalition tactics: When other people's support is sought to influence others.
Acting humble.	Ingratiation: When a person gets you in a good mood before making a request.
Being friendly prior to a request.	<b>Personal appeals:</b> When a person does a favour out of friendship.
<b>Coalition:</b> Getting the support of other people to back up a request.	<b>Exchange:</b> Influencing others through the exchange of favours.
<b>Bargaining:</b> Use of negotiation through the exchange of benefits or favours.	<b>Pressure tactics:</b> Use of threats and persistent reminders are used to influence others.
Assertiveness: Forceful approach to demand compliance with requests.	Legitimate tactics: When requests are used on positions of authority.
Repeat reminders	Consultation: When other people are asked to participate in planning and activity.
Higher Authority: Gaining support of higher levels to back up requests.	
Sanctions: Use of rewards and punishment	

# **CONTRASTING POWER AND LEADERSHIP**

The two concepts are closely interrelated. The differences between power and leadership:

POWER TACTICS	POWER TACTICS
Leadership requires a fit between the goals of the leader and those of the follower.	Power does not require compatibility of goals.
Leadership focuses on the downward influence on subordinates.	Research on power encompasses a broad area. Power focuses on tactics for gaining compliance.
Leadership research emphasises style.	



# BASES OF POWER: WHERE DOES POWER ORIGINATE? WHAT GIVES CERTAIN PEOPLE POWER OVER OTHERS?

Coercive power	Power based on fear. The power to influence others through the threat of negative sanctions or the removal of positive events. Men exercise this kind of power with ease.
Reward power	The potential to influence others because you have control over resources. When followers comply they expect to get valuable rewards. Women managers need to be conscious of the possible negative effects of this kind of power on colleagues and subordinates
Referent power	The potential one has to influence because of the strength of the relationship between the leader and the follower. "You can exercise power over me because I want to please you" is an example of a follower desiring resources from the leader.
Legitimate Power	When people influence others because they have the power to do so. It is the power a person receives as a result of the position they hold. The position may bestow legitimate power but if this power is misused or even abused, there can be serious repercussions for the woman manager.
Expert power	Influence based on special skills or knowledge. The power of knowledge. There is a need for leaders to be generally knowledgeable and also to keep abreast of developments in their area of responsibility if they are to enjoy expert power. Because of women's propensity to embrace the others and to be humble about their achievements, women are often overlooked as experts, even though they may have the knowledge and skills.

# Match the following sentences with the five bases of power as described above:

SITUATION	POWER BASE
I want to avoid getting Sam angry because he can harass me at work.	
I defer to Maggie's judgement in engineering matters because she has the experience and knowledge to earn my respect.	
It will be an advantage to trade favours with Colleen. She will be in a position to give me special benefits and rewards.	
Sila has the right to expect me to comply with her legitimate requests considering her position and job responsibilities.	
I like Thabang and I enjoy doing things with him.	

# **POWER TOOLS**

Imagination:	The power to be creative. Creativity is said to be more important than knowledge (Discussion).
Commitment:	The power to get things done.
Power of knowledge:	The knowledge to do things.
Power of generosity:	Ability to serve others in the spirit of harmony.
Power of influence:	Ability to position oneself strategically and to network.
Power of persuasion:	Power to motivate others.

# **EXERCISE**

Which power tools appeal to you?



# UNIT 6:

# LEADING THROUGH ORGANISATIONAL CHANGE

#### **OUTCOMES**

Having completed the unit, the participants should be able to:

- Understand factors that affect change within the Department of Education.
- Distinguish between what can be changed and what cannot.
- · Choose change management strategies.
- · Identify different stages of change.

#### **DEFINING CHANGE**

Brief discussion: What is change and in what way do men and women handle change differently?

It is widely argued that in organisations, attitudes and values should be receptive to change and diversity. Change of any kind provokes deep personal reactions of fear, excitement, apathy and sometimes anger. Change comes in many forms and at all levels in organisations. It can be viewed as a welcome relief or an infringement on people's lives. There is a need to realise that any kind of organisational change affects power relations. Thus, beneath the surface of many organisational transformations lurks gender prejudice and stereotyping that requires women to challenge their nature and also deal with the effects of their subordination.



#### FACTORS THAT AFFECT CHANGE IN ORGANISATIONS

INFLUENCING FACTORS	RELATED ISSUES
Economic fluctuations	Increasing inflation Interest rate fluctuation Foreign currency fluctuation Instability in emerging markets
Technology	More automation including computers Virtual schools Total quality management Re-engineering of organisations
Globalisation	Mergers and acquisitions Capability to rapidly develop Innovation
	Social Trends Increased/decreased school intakes HIV / AIDS
	Capability to rapidly develop new products and services  Crime Rate Poverty
Political Environment	Changes in role players in education e.g. Minister/ MEC/DG, etc.

# ELEMENTS OF CHANGE: WHAT WOMEN LEADERS CAN CHANGE

There are six major elements of change in organisations

#### Change of structure

Making alterations in:

- Authority relating to decision-making structures.
- Co-ordination of operations.
- Job designs/structures.

# Changing technology

Modifying the way information is arranged, captured, processed and presented. Changing the methods and equipment to do the above.

#### Changing physical setting

Altering the space and layout arrangement in the workplace.

#### Changing people

Changes in employees

- Attitudes, e.g. attitudes toward corporal punishment/religion in schools, etc.
- Skills, e.g. need for women managers to be computer literate in the information age.
- Expectations, e.g. encouraging girl learners to pursue maths and science studies.
- Perceptions, e.g. perception about women managers as appointed to merely reach equity targets.
- Behaviour, e.g. actually beginning to respect the language rights of diverse learners.

#### Policies, systems, procedures and practices

Changing policies that guide an organisation's operations, considering that the legal mandates of various structures when it comes to policy formulation. Changing procedures and the practices emanating from these policies and procedures to fit the context without deviating from the policy directives.

#### Changing attitudes and stereotypes toward women as leaders

Creating awareness of stereotypes held about women and highlighting facts that negate those stereotypes. Awareness changes mind-sets. Subsequently, this also affects attitudes and changes them.



#### **CHANGE OPTIONS**

#### STRUCTURAL CHANGE

Less bureaucratic

Makes organisation flatter

Redefined responsibilities

#### **TECHNOLOGY**

New equipment

New methods

Automation

Computerisation

#### PHYSICAL SETTING

Space configuration

Interior design

#### **PEOPLE**

Attitudes and behaviours

Reducing and counteracting stereotypes

Empowering people through interventions

Communication process

Decision- making

Problem solving

#### **POLICIES SYSTEMS & PRACTICES**

Mainstreaming gender issues into policies

Specific strategies for change

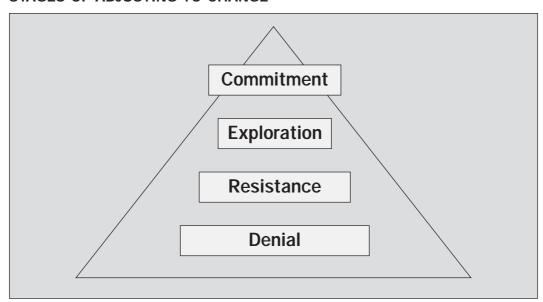


Reflect on your position in education. Think about all the changes that are taking place. Consider the recent changes that you have had to make in your professional life.

#### Consider the following:

- · What changes were you supposed to make?
- How did you make the changes?
- · What worked well?
- How did the changes make you feel?
- What did you learn from the experience?

#### STAGES OF ADJUSTING TO CHANGE



**Denial:** when people try to maintain the status quo and convince themselves that nothing has changed.

**Resistance:** anger, frustration and apathy characterising the proverbial last kicks of a dying horse.

**Exploration:** examining and considering options to change and seeking new solutions in dealing with change.

**Commitment:** embracing change, adaptation to the new environment and seeing change as a challenge.

# STRATEGIES FOR WOMEN IN LEADERSHIP POSITIONS DEALING WITH RESISTANCE TO CHANGE

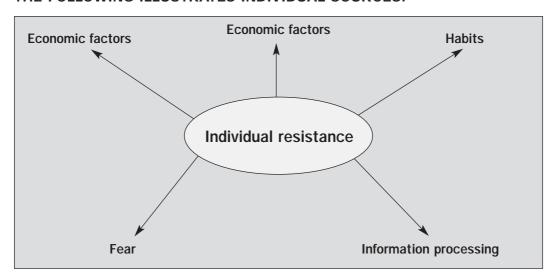
STAGE	STRATEGY
Denial	Examine the causal factors for denial. Understand the context within which the denial occurs. Provide information focusing on why change occurs. Provide feedback constantly. Increase communication channels. Emphasise and reinforce efforts towards acceptance.
Resistance	Identify the type of resistance e.g. complaining, go slow, threat of a strike Bargain Negotiate Encourage people to vent their feelings Listen and reflect on feelings Communicate non-judgementally Give empathy and support Resistance can be implicit
Exploration	Communicate effectively Refer to relevant information sources Strategic planning Resource mobilisation Networking
Commitment	Reinforce commitment through effective communication Create opportunities for growth Motivate Offer assistance when needed Encourage independence and inter-dependence



#### SOURCES OF RESISTANCE TO CHANGE

There are two distinct sources of resistance to change. Sources that reside in a person's basic characteristics such as perceptions, personalities and needs commonly grouped as individual sources, as well as organisational sources of resistance to change.

# THE FOLLOWING ILLUSTRATES INDIVIDUAL SOURCES:



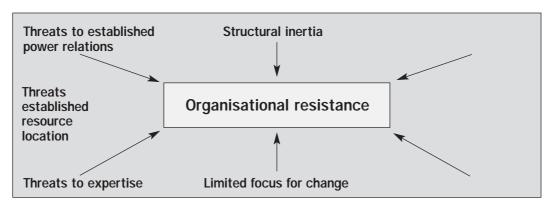
Habits:	When change affects the way we are used to doing things, such as lunchtime routine, catching a later bus and parking at covered parking.
Security:	When people fear that their job is in jeopardy. An appropriate example for the South African situation is the introduction of Employment Equity measures and the implementation of empowerment and equity plans in organisations.
Economic factors:	When change is perceived as lowering the income of employees.
Fear of the unknown:	Uncertainty and ambiguity breeds fear, not knowing what the future holds.
Information processing:	When people hear what they want to hear and create perceptions out of that and do not pay attention to what is.

Which sources of resistance are evident in individuals within your sphere of influence?



How can women in leadership positions manage these sources of resistance?	
What aspects of change are you most resistant to and why?	

# ORGANISATIONAL SOURCES OF RESISTANCE TO CHANGE



Structural inertia:	Built-in mechanisms within the education environment that produce stability. When there is change within the organisation, these mechanisms are prone to resistance.
Limited focus for change:	The Department of Education is made up of change: independent sub-systems. One cannot change without affecting the other. This systemic approach means that if there are limited changes in any sub-systems, these would be swallowed by the bigger system.
Group inertia	Group values and norms affect the values of individuals within organisations.
Threat to expertise:	Specialised groups within an organisation may be threatened by change.
Threat to established power relations:	When decision-making structures change, the power relations within the organisation also change.
Threat to established resource allocation:	Groups in organisations that own and control resources are often threatened by changes.

#### **CONCLUDING THOUGHTS FOR WOMEN LEADERS**

Women leaders need to brand themselves and define who they are in relation to their leadership roles. Women must also be persuasive and forth right in selling their ideas to others. In order for women leaders to distinguish themselves in what they do, they need to have:

- A vision
- A sense of purpose, and not be spectators of their own destiny.
- A sense of commitment.
- Self-confidence.
- · Have control over their own career destiny.
- · Create more knowledge, read extensively.
- Add value to the Department.
- Understand the power of networking.
- · Have the ability to mobilise.

Women leaders should have a strong personality to mobilise around strategy and should strive to achieve the following winning criteria in the Department to maintain their own visibility:

- · Speed: Do things quickly.
- · Dependability and reliability: Do things on time
- Cost effectiveness: Do things economically without compromising quality.
- Innovative: Doing new things constantly bringing new ideas to work.
- Flexible: Constantly changing what you are doing.
- · Quality conscious: Constantly doing things right.



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



### PREFACE: DIVERSITY MANAGEMENT

This module starts with an exploration of different components forming a mix that defines what diversity is about. The connotation of this mix as it relates to women managers and leaders includes issues of race, ethnicity, age, disability, socio-economic status, language, geographic background (rural or urban), religious beliefs and sexual orientation.

The module reinforces the recognition that particular groups of people, especially women, have traditionally been disadvantaged in employment because of discriminatory practices, stereotypes and attitudes. It therefore, becomes essential also to recognise the benefits and potential offered by diversity management, as highlighted in the module. This potential indicates that the benefits of diversity management are achieved through:

- Enhanced understanding of cultural differences.
- Improvement in teaching and managing practices.
- · Better provision of education to a diverse society.
- Increased capacity to deal with education challenges.

The module suggests a diversity plan for all levels in education. This proposed plan indicates that in an educational setting, issues of equity and equality can be expanded to show that everyone, educators, non-educators, learners, and school governing bodies, including women managers and leaders, need to have access to opportunities.

Managing diversity in education will ensure that women managers and leaders are enabled to:

- · Foster mutual respect in multicultural settings.
- Enhance teamwork.

The module concludes by emphasising the point that diversity in education enriches the educational experience. It will promote the personal growth of women managers and leaders. Through exposure to diversity management exposure, women managers and leaders will experience increased understanding of the differences found in South African society.



### **EXPLANATORY NOTES:**

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FACILITATOR'S INPUT/NOTES

This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.



**HINTS** 

This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.



**ROLE-PLAY** 

This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who participated actively in the exercise.



**EXERCISE** 

This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.



**CASE STUDY** 

This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.



**SELF-TEST** 

This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.



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#### INTRODUCTION

This module was developed against the background of the guidelines provided in the document "Management Teams: Managing Diversity", developed by the Department of Education. The focus of the module is on developing the diversity management skills of women, particularly women in the Department of Education.

Various socio-economic and transformational elements have resulted in the emphasis being placed on women managers and leaders. Since the advent of democracy in 1994, the South African Government has been creating a positive legal environment in its attempt to reverse the history of women's discrimination and marginalisation. These laws have been developed to promote equality for all, regardless of race, class, disability, sexual orientation and religion.

Despite the liberalisation of legislation, gender-related challenges and problems that need to be addressed are increasing. One way in which this tide can be stemmed is by building the capacity of women in management and leadership positions so that they can provide effective service delivery. It is essential to ensure that women managers and leaders are equipped with appropriate skills for dealing with issues of diversity within an enabling legal framework.

This module introduces gender planning and gender mainstreaming processes necessary for the integration of women in planning processes:

- Gender planning focuses on broad issues of transformation. These range from issues such as managing change, redistribution of power and resources within organisations, negotiations and participation issues. It does not consist of a process requiring a number of procedures to be followed.
- · Mainstreaming on the other hand focuses on:
  - Developing plans for women's participation in planning.
  - Integrating women as decision-makers.
  - Implementing indicators that can be monitored and that will provide evidence of outcomes of women's contributions

#### **BROAD AIMS**

- To enhance the knowledge and skills necessary for women to be effective leaders in management and leadership positions.
- To build capacity of women managers and leaders for effective school management.

#### **OUTCOMES**

At the end of this module, women managers in education should have developed:

- A broad understanding of the concept of diversity management, its dimensions and its collective mixtures.
- An understanding of different diversity management strategies and diversity implementation approaches.
- An appreciation of the process of developing and implementing the seven phases of the model diversity plan.



# **UNIT 1:**

### **DEFINITIONS OF DIVERSITY**

#### **OUTCOMES:**

Having completed this module, participants should be able to:

- Appreciate numerous ways in which people differ.
- Identify different ways in which diversity issues play themselves out in their places of work
- Honestly assess the extent to which diversity is managed in their workplace.
- Identify diversity challenges facing their workplace.

#### **DIVERSITY DEFINED**

'Diversity': all the ways in which we are different and similar along an infinite number of attributes. It is a collective mixture characterised by differences and similarities that are applied in pursuit of organisational goals.

'Diversity management': it involves the process of planning for, organising, directing and supporting these collective mixtures in a way that adds a measurable difference to organisational performance.

Diversity mixtures are categorised in different ways. In the context of women in management and leadership positions in education, the most pertinent are the following:

- · Workforce diversity.
- · Behavioural diversity.
- · Structural diversity.
- Business diversity.

The first, a combination of differences and similarities, is divided into the following four broad categories, namely workforce, behaviour, structural and business diversity.



WORKFORCE DIVERSITY	BEHAVIOURAL DIVERSITY	
<ul> <li>Race</li> <li>Gender</li> <li>Ethnicity</li> <li>Physical ability</li> <li>Sexual orientation</li> <li>Age</li> <li>Parental status</li> <li>Economic status</li> <li>Geographic background</li> </ul>	<ul> <li>Work styles</li> <li>Thinking styles</li> <li>Learning styles</li> <li>Aspirations</li> <li>Communication styles</li> <li>Practiced beliefs/values</li> <li>Attitudes and expectations</li> </ul>	
STRUCTURAL DIVERSITY	BUSINESS DIVERSITY	
<ul> <li>Multi-disciplinary teams</li> <li>Alliance and interaction across levels</li> <li>Hierarchy</li> <li>Divisions</li> <li>Acquisitions</li> <li>Mergers</li> </ul>	<ul> <li>Cycle time</li> <li>Approaches to customer service</li> <li>Degrees of innovation</li> <li>Labour market realities</li> <li>Market relations</li> <li>Business norms</li> <li>Business culture</li> </ul>	

There are further differences that can be broadly called individual differences within these broad categories. These individual differences are crucial in understanding individual aspirations. Failure to recognise and acknowledge individual differences within broader groups is often the root cause of stereotypes. These can be categorised as follows:



PERSONALITY DIMENSION	BIOGRAPHICAL DIMENSION	
A combination of characteristics that make each individual to be unique and is reflected in interaction with others  Patient-impatient  Doer-thinker  Listener- talker  Flexible-rigid  Theoretical-Practical	Relates to those inherent characteristics that we are born with, such as circumstances surrounding our early childhood. These are beyond the individual's control but they shape our expectations, assumptions and opportunities such as:  • Age • Gender • Race • Ethnicity • Talents • Home background • Interests	
CAREER HISTORY	SOCIAL STANDING	
This relates to characteristics that we acquire as we progress in the world of work and they shape our assumptions, expectations and opportunities. These include:  Work status Rank Work location Work context/field Department/division/unit	Social factors and life experiences that are more under a person's control that influence behaviours, attitudes, expectations and opportunities, e.g.  • Marital status  • Membership of organisations  • Educational background  • Socio-economic status	

#### THE BENEFITS OF DIVERSITY MANAGEMENT

- Increased effectiveness of women in and into management and leadership positions.
- Improved co-operation, collaboration and team building.
- Improved employee morale.
- Reduced absenteeism.
- Improvement of recruitment, retention and promotional policies.
- Improved mentoring and coaching processes.
- Increased sharing of information.
- Increased innovation, adaptation, as well as rounded perspectives on decisions.
- · Increased problem-solving skills by women in and into management and leadership
- Increased inter-personal communication and negotiation skills.
- Increased tolerance for differing perspectives.



#### **SELF-ASSESSMENT**

Identify aspects of diversity that are prominent in your work environment, and indicate how each one of these aspects you identified is being managed.

ASPECT OF DIVERSITY	HOW IT IS BEING MANAGED
Race	
Language	
Culture	
Ethnicity	
Structural	
Hierarchy/ranks	
Personality	
Marital status	
Gender	
Interests	
Socio-economic status	

#### **EXERCISE**

A discussion focussing on diversity stories as presented below.

1. Ramokone Matlala (10) attends school at Teresa Primary School. Teresa Primary School is an integrated Model C school. Although it has a good mix of learners of all races, African pupils are in the majority. Its governing body, however, is predominantly white with only one black parent as a member. Besides the fact that Teresa Primary School is within reach of the Matlala family home, what impressed and attracted them to take Ramokone to the school is the fact that the school offered Sepedi as a subject. The Matlala's are proud of their heritage and language and saw this as a good opportunity for their two children to have an education strongly based in their cultural values.

When the Principal introduced Mrs Groenewaldt, Ramokone's Sepedi teacher, they were surprised but never thought much about the impact this would have on their beliefs. The school had a reputation as one of the best in Lebowa.

A few months later they became concerned about Ramokone's pronunciation of certain words in Sepedi. What compounded matters was that when corrected, Ramokone would insist that her teacher had taught her and would persist with mispronouncing the offending word. On one occasion Ramokane's grandmother visited them and Ramokone insisted on being allowed to pray in Sepedi. The family could barely recognise 'The Lord's Prayer's as pronounced by Ramokone.

2. Mrs Boshoff of Prieska maintains she has been overlooked for a management position in the Northern Cape Provincial Department of Education. She is an educational specialist and is working with male colleagues at her level and in more senior positions. Male incumbents hold all the senior positions. She applied for a more senior position as advertised. Despite her qualifications and experience, she is not even short-listed.

On enquiry, she is told that because of the prevailing conservative environment in Prieska, a rural town, her male subordinates may find it difficult to accept her authority. Mrs Botha, who had recently resigned from the position now advertised, had similar problems. The provincial department, therefore, does not want to make the same mistake.

3. Mr Chuku, a teacher, hails from Nigeria. He has been in South Africa for seven years. During his stay in South Africa, Mr Chuku has developed a passion and keen understanding of the new outcomes-based education system (OBE) being introduced. Within a few years, he had mastered the application of OBE and demonstrated his capabilities in most schools in Alexander, a nodal area.

Many schools in other areas in the country sought his expertise. However, his passion has always been to work in rural areas as he considers himself 'a rural boy' and has a grasp of rural issues. Places like Alexander lived at too fast a pace for him.

When a position arose in Mothibistad he grabbed the opportunity. This was another nodal area in a rural setting perfect for his needs. He started teaching Science there in January.

In February, his Grade 9 class walked out of his lesson. They reported to the Principal that Mr Chuku was not teaching properly. They could not understand him and he became angry when they asked questions in class. The pupils felt they were wasting their time in listening to him.

4. Maria stays with her parents at Mr Koekemoer's grape farm. She is 12 and attends a nearby farm school. Harvest time requires intensive labour irrespective of the 'disruption' of school attendance. In Welgemoed, where Maria attends school, the girls of school-going age are required to assist in the harvest while boys may attend school.

Mrs Smuts raised the matter during a meeting with the governing body when she realised that the absenteeism of girls increased dramatically more than that of boys during harvest time. The issue was dismissed and matters considered 'more serious' were dealt with. Seeing no change, Mrs Smuts decided to approach the parents of those girls affected by the harvest. More than half of the parents indicated that education was not important for girls. Girls had to learn to work while young and help on the farms. Boys should be given an opportunity to gain education as the heads of the households of the future.





What diversity mixtures can you, as a group, identify from the stories?
Identify diversity tensions demonstrated by these stories.
Which particular diversity mixtures relate to your situation within the Department at your national, provincial, district office or your school?
What diversity management approaches can be applied to these tensions?

# UNIT 2:

#### COMPONENTS OF DIVERSITY MANAGEMENT

#### **OUTCOMES**

Having completed this unit, participants should be able to:

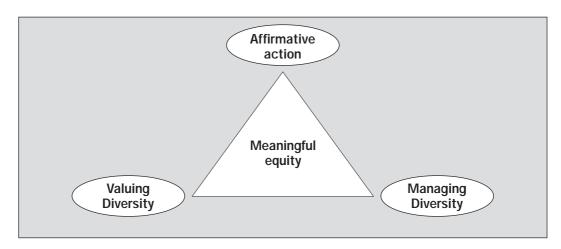
- Identify various components of diversity management.
- Identify tensions that arise in the course of managing diverse groups.
- · Understand tactics that can be used to manage diversity.
- Identify the right tactic for the right situation.

#### COMPONENTS OF MEANINGFUL EQUITY IN THE WORKPLACE

Three general components that lead to achievement of meaningful equity are:

- Affirmative action.
- · Valuing diversity.
- · Managing diversity.

The achievement of meaningful equity in the workplace depends on the extent to which these three components are integrated. This leads to equity targets being met, and also keeping those individuals who are recruited from the designated groups.



#### AFFIRMATIVE ACTION

Affirmation action is an approach with a goal to gain representation and upward mobility for marginalised groups. It can be used to increase the number of women in and into management and leadership positions.

The Employment Equity Act requires employers to take affirmative action measures in order to bring about adequate representation of people from the previously disadvantaged groups. Employers are expected to come up with measures that will lead to identified previously excluded groups being brought in.



This training programme for women in and into management positions in education can be considered as one of the affirmative action measures that DoE is taking to address the problem of poor representation of women in management positions in education. The main features of affirmative action measures are that:

- They focus on special efforts for groups that are under-represented and are targeted for intervention.
- They address specific problems identified that militate against the achievement of equity in the workplace

At this level, there is a need to take affirmative action measures mainly in compliance with the requirements of the Employment Equity Act.

#### **VALUING DIVERSITY**

Valuing diversity takes the process initiated by adopting affirmative action measures even further in that valuing diversity:

- Aims to improve the quality of relationships between people.
- Focuses on understanding the cultural differences and similarities within an organisation.
- Opens up people's emotions and minds to diversity and establishes mutual respect and greater acceptance of diversity initiatives.

The idea behind valuing diversity is acknowledging the fact that differences need to be accommodated in the workplace in order for people from diverse backgrounds to feel part of the workplace.

#### **MANAGING DIVERSITY**

Managing diversity brings the issues of diversity management to the mainstream, and looks at the issue of achievement of diversity as crucial to the success of the organisation. Managing diversity

- Aims to improve the full use of human resources in an organisation.
- Is motivated by the organisation's commitment to provide quality service and increase productivity.
- Is focused on creating a diversity-friendly management system.
- Opens up a whole system to change and questions policies, procedures and practices within organisations.
- Sensitises the whole organisation to the need to be accommodating not only in what the organisation does, but also in how things are done at that organisation.

As women managers and leaders, you need to understand that the various components in diversity management are all important and it is the synergy between various components that leads to meaningful equity in the workplace which, in turn, leads to a workplace environment that:

- Is welcoming to people from diverse backgrounds.
- Focuses less on how people do their jobs and more on the products.
- Appreciates the strength and synergy that comes from differences.



# DIVERSITY MANAGEMENT TACTICS: IMPLICATIONS FOR WOMEN MANAGERS AND LEADERS

There are eight diversity management tactics that you can use to address diversity issues in your office/school. Often tactics can be identified and applied across the whole department or just within a particular occupational level at national, provincial, district or school level. It is thus essential that you recognise and identify tactics so that you can develop strategies for addressing them:





## **TACTICS**

TACTIC	DESCRIPTION OF A TACTIC	RECOMMENDED APPROACH
Denial	When everyone denies that differences and diversity tension exist.	Awareness creation:     Culture/climate survey.     Use survey findings to confront the denial.
Inclusion/ exclusion	Include by expanding the number of mixtures. Exclude by minimising the number and variety of mixtures.	Effective affirmative action measures. Increase the number of target groups. Focus on fair recruitment and selection practices.
Assimilation	Forcing and coercing the minority group to conform to the values and norms of the majority and dominant group	<ul> <li>Create awareness around diversity issues:</li> <li>Engage minority groups and make sure they retain their identity.</li> <li>Recognise the strength brought by diversity.</li> </ul>
Suppression	Removing the issue of diversity from one's consciousness.	Recognise legal obligations: Take steps to comply with legal provisions Recognise the impact of suppression on productivity
Isolation	People who are different are isolated from the mainstream and are allowed minimal interaction with the mainstream group	Recognise legal obligations and consequences of lack of compliance
Toleration	When differences are not accepted but their right to exist is recognised. Co-existence without connecting.	Come up with programmes to address fears, misconceptions and stereotypes.
Relationship building	Purposeful effort to foster relation- ships by focusing on similarities and minimising the challenges associated with differences.	Come up with appropriate team building initiatives
Mutual adaption	Full accommodation of the entire diversity mixture. Facilitate contribution to organisational goals.	Combination of:

(Adapted from Rainmaker Management Consultants)



#### **CASE STUDY**

Discuss in small groups, newspaper reports that the Gauteng MEC visited a high school in Gauteng as part of his programme of surprise visits to schools. The MEC was also checking on progress after a racial incident at the school two years prior to his surprise visit to schools. This involved a black pupil from Soweto who was kicked by white pupils on the playground. Indications were that his eye was badly hurt and there was a possibility that the boy could go blind as a result of the injury.

When asked about the student's progress, the Deputy-Principal, Mrs X, said she had lost track of developments. She wondered whether the eye had really been hurt as severely as reported because his parents declined when the school offered to take him to specialists.

Mrs X maintains that the school is a model organisation that should serve as a symbol of co-operation and demonstrate how different cultures and race groups can work together. She is quoted as saying: 'No matter what the colour of your skin is or the nature of your background, the fact that we are all South Africans. She is on record as having stated that the diversity of South Africa is what makes the country beautiful and special. As such, we need to recognise that our young people are the builders and architects of our future.

#### **EXERCISE**

Think of the facts of this case and using the grid below:

- Identify and discuss the diversity tensions in the school.
- Identify tactics used by Mrs X in the school to deal with the challenge.
- Suggest the best approach to deal with diversity tension.
- Indicate what the outcome will be when a particular approach is applied.

DIVERSITY TENSION	IDENTIFIED TACTIC	SUGGESTED APPROACH	ANTICIPATED OUTCOME



#### CHALLENGES FOR WOMEN MANAGERS AND LEADERS

- Women managers face the challenge of a diverse workforce of educators. They are required to ensure that work teams are effective and work within cohesive standards.
- The global economy needs women managers and leaders who can deal with different national and international situations and cultures.
- There is a great need for women managers to ensure effective collaboration between functions within the Department of Education.
- As women managers, you are challenged also to foster and create a forceful vision that will drive education and give direction toward a new world perspective.

#### BEST PRACTICE FOR WOMEN MANAGERS AND LEADERS

**Accommodation:** any flexibility in practice and procedure without which an employee could not participate actively and effectively in the workplace. This is achieved through realising the importance of accommodating the needs of women and the multiple roles they play as employees, at home as mothers and as community developers.

**Diverse work teams:** the ability to capitalise on the benefits of a diverse work team. You are expected to assist team members to work well and help them improve on one another's contribution.

**Equal opportunity:** removes all forms of attitudinal and systemic discrimination that inhibit merit-based systems.

**Dignity and respect:** treat all employees and school children with dignity and respect. It is important to listen to all people regardless of rank, age, background, race, sexual orientation, gender or other differences.

Serious questions that all women in management and leadership positions should ask themselves:

- How do I make sure that there is unity and collaboration across races, gender, differing physical abilities, people of different sexual orientation and those of different religions?
- How do I make sure that the current collaboration and unity efforts are maintained within the Department of Education at all levels and across different functions?
- How do I enhance the ability of my team to process diverse issues and relate those to service provision within DoE?



## **UNIT 3:**

### MANAGING DIVERSITY

#### **OUTCOMES**

Having concluded this unit, participants should:

- Know how to develop a diversity management plan.
- Understand the ingredients of a model diversity plan.
- · Understand the concept of gender mainstreaming.
- Know how to use gender mainstreaming to bring about organisational change.
- Know how to bring gender issues to the epicentre of the organisation.

#### **DEVELOPING A MODEL DIVERSITY PLAN**

All managerial activities begin with a plan. Diversity management is no exception to this rule. In developing a model diversity management plan, the following phases are recommended as a guide. This plan can be modified for use at national, provincial, district or school level.

#### PHASE 1

Understand the context in which the Department of Education is operating at national or provincial departmental level, district or school level:

- Identify the strategic challenges that face the Department at national, provincial, district or school level.
- List the strengths, weaknesses, opportunities and threats that influence service provision within education.
- Describe the things that you and your office or school are best at. What are its unique qualities that need to be harnessed and reinforced?

#### PHASE 2

Using the earlier definitions, identify and define the diversity mixtures within your office or school. What are the current elements of mixture within your situation?

#### PHASE 3

Identify diversity tensions that exist in your situation. What issues of diversity create tension within your office or school? Is the issue on the minority of women in and into management and leadership positions within your situation a concern?

#### Phase 4

Secure top- level commitment. Leadership of the diversity planning process needs to be clearly identified. Identify leadership at national, provincial, district and school level.

The executive management needs to understand the diversity process and how it links to the Department's strategic goals.



#### PHASE 5

Establish a Diversity Steering Committee to provide leadership, involvement and participation. The committee should consist of a cross section of the total Department. School effectiveness teams are the appropriate vehicles for driving diversity management within education:

#### At the level of schools -

- Seek representation from the provincial and district office.
- · Involve the SGB.
- Involve the parents of learners.
- Involve learner representatives.
- · Involve any other stakeholders within the school and the community.

#### PHASE 6

Complete an assessment of diversity issues, by:

- Conducting an assessment to identify issues of diversity within the Department at the national, provincial, district and school levels in order to gauge the prevailing organisational culture.
- Review the Department's systems, plans, policies and practices as these are necessary in diagnosing existing conditions. Assess how these will impact on your planned actions.
- Seek guidance from the Department's strategic direction.

#### PHASE 7

Establish a diversity plan:

- Analyse the information collected in the assessment phase.
- Use this information to craft and develop a diversity plan.
- Utilise the assessment data to identify key issues that need to be addressed.
- Assist the diversity steering committee to prioritise these issues.

#### PHASE 8

Gain the management team's approval:

- Determine the degree of top-level commitment to the diversity plan.
- Assess whether resources for implementation are available.
- If there are no sufficient resources plan how you are going to mobilise them.
- Present the diversity plan to the district manager, provincial or national executive management for their approval.

#### PHASE 9

Implement the training and other diversity initiatives such as:

- Awareness creation holding workshops, seminars and conferences as well as through publications in newsletters.
- Knowledge and skills building programmes.
- Leadership development programme.
- Mentoring and coaching programmes creating awareness of the benefits of such programmes and proactively influencing the development of mentoring and networking programmes. Monitor and evaluate existing programmes.



#### PHASE 10

Monitor and evaluate the impact of diversity efforts. This is an on-going phase that can result in modifying the diversity plan and any other diversity initiative.

#### **EXERCISE**

Using diversity challenges faced by your school, district, or province, identify typical issues that would be uncovered if a Diversity Management assessment was conducted and highlight ways in which these issues could be dealt with to create healthy diversity management in your immediate work environment



# UNIT 4:

# USING GENDER MAINSTREAMING AS A TOOL TO MANAGE DIVERSITY

Literature propagates two major approaches to integrate women into planning activities, namely, gender planning and gender mainstreaming. Gender planning, on the one hand, aims to integrate women into planning on an equal basis with men. This can be done through meeting women's needs. Women's needs arise from gender relationships relating to the division of labour and an unequal access to resources. Lack of exposure due to the inequalities of the past and many responsibilities that continue to compete for the attention of women contribute to this situation. On the other hand, gender mainstreaming, is a goal-oriented process that promotes the participation in decision-making, planning and resource allocation.

#### **OUTCOMES**

At the end of the unit, participants should:

- Understand the concept of gender planning.
- · Know what gender mainstreaming is.
- Understand the relevance of the project life cycle to planning.
- Understand the use of gender mainstreaming as a planning tool.

#### WHAT IS GENDER MAINSTREAMING?

Gender mainstreaming emphasises the systematic attention to gender equality issues in planning. This is obviously the function of Departments of Education provincially and nationally. It is a process that works toward achieving the goal of gender equality. It presupposes that something – gender equality – has to be brought into the mainstream and be placed in the centre of planning, processes and practices.

Gender equality is a fundamental value that should be reflected in planning. It can be placed within planning as:

- A strategic initiative.
- Equity goal that is seen as business imperative.

#### **GENDER MAINSTREAMING IN EDUCATION**

The National Gender Policy Framework identifies three major interventions that government departments can initiate in the area of gender mainstreaming. This policy framework mandates government departments, including the Department of Education, to:

- Promote women's empowerment and gender equality.
- · Raise public awareness about gender.
- Promote women's empowerment within the policies and practices of the departments.
- Create an expectation from the departments to develop a gender mainstreaming strategy.

For you to facilitate the development of a mainstreaming strategy in the Department of Education at national, provincial, district or school level, consider the following:

- The issue of gender mainstreaming is done within the constraints of available resources.
- The issue of gender mainstreaming should be carried out within the confines of the law.
- The empowerment of women means attracting and retaining high-calibre individuals who happen to be women.



#### POLICIES AND PROCEDURES THAT NEED TO BE ENGENDERED

Gender mainstreaming does not happen in a vacuum. Once the employer has taken a strategic decision to mainstream gender issues, it becomes imperative that policies and practices of the organisation be engendered. This means re-visiting policies with the explicit aim of determining that there is nothing in the policies that militates against the career advancement of women in the workplace in terms of policies, organisational culture and practices.

# TYPICAL POLICIES THAT OFTEN DISCRIMINATE AGAINST WOMEN EMPLOYEES

These are merely examples and do not necessarily reflect the state of affairs at DoE. These are the areas that often need revisiting when mainstreaming gender issues.

POLICY/ PRACTICE/ ORGANISATIONAL CULTURE	HOW IT DISCRIMINATES AGAINST WOMEN
Recruitment/ selection	Composition of selection panels – due to the overwhelming presence of men in senior positions, an all-male panel is still possible, especially for senior positions. This often places female candidates who are intimidated by men at a distinct disadvantage.
Practice of holding important meetings after working hours.	Women with children are disadvantaged by this practice. In areas where safety is an issue, this also places female employees at a disadvantage.
Practice of discussing business issues at a pub.	Women often do not feel they belong to the pub and this means that they are deprived of the information shared in this way.
Allocation of study leave benefits based on a requirement of continuous service.	This places women who are at the child- bearing phase of their lives at a distinct disadvantage.
Lack of pay parity- where men continue to earn higher salaries than women.	This places women at an obvious disadvantage and it is an illegal.

#### **EXERCISE**

Identify policies, practices and procedures that DoE will have to revisit in order to mainstream gender issues		

#### TAKING ADVANTAGE OF GENDER MAINSTREAMING

A favourable political climate currently exists that seeks to promote the advancement of women, and several government departments including the Department of Education seek to promote the advancement of women. The political climate provides a platform from which women can advance. This, however, still leaves it up to the individual to take advantage of new opportunities. In this climate, career life planning for women is even more important. The question that women managers should be asking themselves is "What is it that I need to do to take advantage of the favourable environment created by government?"' Answers to this question are provided in the Self Management Module.

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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

Theme four: Administrative Modules

Module 11: Conducting Productive Meetings.



#### PREFACE: MANAGING RESOURCES

The attitude that: "a woman's place is in the kitchen" is a very old one. Although many efforts have been put in place to fight this attitude, it still prevails nonetheless, and is entrenched in a number of instances by women themselves, failing to seize the opportunities at hand.

The South African government has put in place the legislation, policies and interventions to assist women to climb the corporate ladder into senior management positions. Today there are Employment Equity Plans in place and various other legislative frameworks e.g. the Human Rights Commission, the National Day of Women (August) that are celebrated nationwide, to name but two.

This module on managing resources is one such intervention aimed at assisting women to take note of and overcome the barriers that prevent them from climbing the corporate ladder. The module starts by giving an overview of what management is. It then describes some of the barriers and the challenges that women managers are likely to be confronted with. It also explains the various responsibilities of different stakeholders within a school environment and ends by outlining the strategic importance of human resources, their management and highlights the importance of constant evaluation.

The ultimate criterion for measuring the effectiveness of management is the extent to which outcomes are achieved and intentions are translated into observable change.



# **EXPLANATORY NOTES:**

=	FACILITATOR'S INPUT/NOTES	_	This icon indicates sections in the
			manual where the facilitator is required to refer to the guide for detail.

=	HINTS	_	This icon gives hints/tips about how
			you can handle the leadership management issues under discussion in the unit.

•	=	ROLE-PLAY	- This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe
			and provide feedback to those who par-
			ticinated actively in the exercise

<del></del>	EXERCISE	_	This	icon	refers	to	an	activity	that
			shou	ıld be	done in	divi	dual	ly or with	า oth-
			ers.	The e	xercise	is a	imed	d at assi	sting
			the p	partici	pants t	o ap	oply	the acq	uired
			skills	s to a	practica	al si	tuati	ion.	

=	CASE STUDY	-	This icon refers to an activity that
			depicts a real life situation. The partic-
			ipants are expected to do the case
			study as individuals or groups. It is
			designed to allow the individual to
			apply both personal experiences and
			information provided in the unit or
			module to come with a solution.

$\checkmark$	=	SELF-TEST	<ul> <li>This icon refers to an activity that should</li> </ul>
			be done on an individual basis. The
			answers to these activities are found in
			the contents of the unit/module.

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**SELF MANAGEMENT** 

#### INTRODUCTION

The number of women entering the world of work as professionals has increased in the last few years, both in the private and the public sector. Research shows that female graduates enter the workforce at levels comparable to their male colleagues and with similar, and at times better credentials and experience However, it seems that the corporate experience and career paths of women and men begin to diverge soon after entry into the world of work. Women, for example, are not entering the ranks of senior management at comparable rates to their male counterparts. This can be attributed to a number of causes. Some are personal. Others are societal while others may be related to gender. Here are some points to note:

- A network of 'old boys' exists. A man's comfort amongst other men is often cited. Subtle biases and prejudices make it very difficult for women, even as talented as men, to reach senior management levels.
- Women, as often said, experience obstacles to receiving recognition and realising their full potential.
- Women often find it difficult to strike a balance between fulfilling their family responsibilities and those required work responsibilities. Many women view their families as a high priority and are penalised by men who are oblivious of family responsibilities.
- Consequences of different communication styles may predispose women not to be taken seriously.
- Interpersonal contact within the same gender may be a reason for the marginalisation of women by men who continue to be in the majority at senior level.

#### **BROAD AIMS**

Having completed this module, women managers should:

- Appreciate the magnitude of challenges that face managers.
- Acquire competencies that will help them manage change.
- Know what management functions they are responsible for in the educational sector.
- Acquire knowledge that will help them manage information better
- Improve their capacity to manage human resources.
- Appreciate the importance of planning and managing school financial and other resources.
- Improve their conflict management skills.
- Improve their ability to manage relationships.
- Understand the importance of monitoring and evaluation.

#### **ASSUMPTIONS**

- The school is the institution in our communities that must recreate the culture of teaching, learning and teach the basic lessons of democracy.
- True leadership transforms people so that they can manage themselves.
- culture of teaching and learning can only thrive where stakeholders feel that they own and are part of the values, mission and ethos of the school.
- · Participation and collaboration are essential in building a form of management that is based on consensus, rather than on instruction and force.
- An important role of education, leadership and management is to create an environment in which the school, as an organisation can reflect and innovative.



# **UNIT 1:**

## UNDERSTANDING THE CONCEPT OF MANAGEMENT

Management is a specific organ in the institutional arrangement of a business enterprise. When we talk of a business enterprise, we talk about the decisions, actions and behaviour of management. An enterprise can decide, act and behave only as its managers do. An enterprise, in the absence of management, has no effective existence. Similarly a school, like any business enterprise, irrespective of its legal structure, must have management to operate and function effectively. School management teams (SMTs) also referred to as professional teams (PTs) and School Governing Bodies (SGBs) serve this purpose. School Management Teams have an operational responsibility in ensuring the day-to-day running of the school. SGB s on the other hand are involved in policy formulation, and formulating the rules of conduct for pupils, professional and administrative staff alike, including issues such as the adherence to budgetary allocations.

Management, in the context of a constantly changing environment such as South Africa, finds itself confronted by enormous challenges since the promulgation and legislation of the National Education Policy Act No 27 of 1996 requiring that important decisions be made by the schools. This poses an even bigger challenge to women managers.

#### **OUTCOMES**

Having completed this unit, managers should understand:

- The challenges facing leaders and managers within education.
- The issues facing the education system, and how they impact on school management.

The environment in which managers find themselves is a constantly changing one, more so in the South African context, following the onset of democracy. While everywhere leadership and management are not static in nature, this is more true of South Africa. It is imperative therefore that women managers entering the South African education arena be properly equipped to fulfil their managerial obligations effectively:

- To correct the imbalances of the past. A top-down management style is no longer relevant
- To redress the inequalities that prevail in certain schools and parts of the country in the
  allocation of resources, for example, a balance needs to be struck both in the rural and
  urban schools, as well as black and white schools. Racial integration of schools should
  receive attention.
- · To address issues of gender inequality.
- To integrate all learners into mainstream activities of the school as dictated by the constitution of the country. Parents, teachers and other members of the community alike have a responsibility to make the education system work. Learners have an opportunity and obligation to contribute and participate in the manner in which the school is run and serve in a decision-making capacity in bodies that govern schools.



Following recent legislation, more and more autonomy has been afforded schools. A general devolution of power and decentralisation of decision-making has occurred. The move is towards requiring that schools manage themselves amidst:

- A reversal of the old ways of doing things and making schools more equitable.
- The provision of performance management based on the quality of education offered by the school.
- Structured management according to new expectations and realities.
- · Preparation of schools to run autonomously.
- The installation of management teams instead of burdening a principal with cumbersome requirements in addition to single-handedly coping with the demands of the learner community.

#### STRATEGIES TO DEAL WITH THE TRANSFORMATION OF EDUCATION

While we hear good news daily about strides made in bringing about equitable education through the media or by word of mouth, these are difficult to replicate because:

- Institutions like schools have a different history, background and context, and this needs to be acknowledged.
- What a good leader sets in motion needs to be monitored until fruition.
- An understanding of the context in which a school operates is crucial. The community a school serves is part of its ambit.
- The organisational culture and the manner of doing things should be creative and constructive rather than destructive. An air of building rapport should prevail in empowering, not constraining individuals and teams. The necessary support should be provided by management where needed.
- A situational-type leadership should prevail that will adapt according to the issues at hand.
- A task-oriented management should focus on effective and efficient operations.

Despite all differences, what should be promoted through the management of the education enterprise is a commitment to:

- Continuous improvement
- Upholding of democratic values in education

#### TIPS

As a woman manager you should:

- Be proactive enough to take the challenge.
- Be a good team builder in leading SMTs.
- Encourage participation of other stakeholders in the SMTs and SGBs.
- Be innovative enough to propose and implement new ways of doing things.



#### **EXERCISE**

Think of your school and imagine it has been in existence before 1994. List aspects of school management that have changed since the promulgation of the South African Schools Act of 1997 and its subsequent amendments. What additional changes does your school still need to make and why.

#### **CASE STUDY**

You were recently promoted to a much more challenging position in your school/ district/region/department. There are some doubts among staff regarding your ability to manage. You perceive them to be not as supportive as they should be, while they are not openly resisting your authority. Your observation suggests a lack of cohesion and reluctance to help in times of need.

After thorough observation you decide to introduce the much needed change. You have in the past successfully implemented the team concept and you decide that this is the are that needs to be tackled first. In order to successfully implement this new way of doing things consider:

The possible reasons for staff not helping each other out			
How would you go about introducing this change			



# UNIT 2:

# ROLES AND RESPONSIBILITIES OF THE DIFFERENT LAYERS OF MANAGEMENT WITHIN A SCHOOL

#### **OUTCOMES**

Having completed this unit, managers should:

- Understand change management processes.
- Understand the roles and responsibilities of different role players in the management of a school.

#### THE ROLE OF THE PRINCIPAL

The South African School Act promotes the principle of cooperative governance with all the role players playing defined prescribed roles. This Act prescribes that the manager of the school, the principal is required to ensure:

- That professional management functions are executed.
- The effective day-to-day administration and organisation of teaching and learning at the school
- That departmental responsibilities as stipulated by the law are performed without failure. That departmental responsibilities as stipulated by the law are performed without failure.
- The efficient organisation of activities that support teaching and learning.
- That personnel and finances are managed prudently.
- That decisions on the extra-mural activities are taken and implemented.
- That decisions about textbooks, educational materials and other equipment to be bought are finalised on time.

#### **EXAMPLE:**

The Principal of a school is required to initiate the formation of School Management Teams (SMTs). The formation of various support teams focusing on specific areas such as finances, curriculum and sports is advisable in so far as these pertain to the daily operations of the school.

The policy formulation structure of the school is the School Governing Body, (SGB) should be established by the Principal. As stipulated by the Schools Act, the Principal and the SGB should provide mutual support in the performance of the their functions. Interference and meddling in the duties of the other should be avoided at all costs.

#### THE ROLE OF THE SGB

- Engage in activities that promote the best interest of the school.
- Ensure the provision of high quality education for learners of that school/institution.
- Make sure that the school has a constitution that is acceptable to all.
- Come up with the mission of the school.
- Formulate a Code of Conduct for the learners of the school.
- Provide support to the principal.
- Decide on school times.



- Control and maintain school property.
- Encourage all stakeholders to give support to the school.
- Make recommendations to HoDs on appointments of staff.
- · Decide on school extra mural activities.
- Decide on choice of subjects within the parameters of the provincial curriculum policy.
- Purchase of the school textbook and equipment.
- Fund raise for the school.
- · Start and administer the school fund.
- Open and maintain a bank account for the school.
- Prepare an annual budget for the school and submit this to the parents.
- Ensure collection of school fees as per agreed decisions.
- · Keep financial records and meet and consult with other stakeholders where necessary.

#### THE ROLE OF PARENTS

- Ensure that learners attend school.
- Serve as elected members on SGBs.
- Ensure that the school provides high quality education.

#### THE ROLE OF LEARNERS

Learners will perform tasks such as assigned by the Principal. Only learners from grade upwards may, if elected by the Representative Council of Learners, serve on the SGB, in the case of a secondary/high school.

## THE ROLE OF THE WOMAN MANAGER IN THE MANAGEMENT OF CHANGE

The new order has thrown the education system into a state of change as they tackle challenges brought about by new realities. As such, dealing with change in the South Africa schooling system has posed serious challenges for most managers. Apart from the mammoth task of implementing change, the task involves overcoming resistance to change for whatever reason. In the context of the different role players in the management of change in schools in the present day South Africa, it is important that all role players see themselves as being responsible for the implementation of change, with the woman manager occupying the driving seat.

- It is important to compile a business plan to diagnose the situation, state the vision and map a way to arrive at the vision. The business will help set targets, timeframes and milestones with which to assess progress and quickly identify obstacles.
- Identify and solicit the involvement and commitment of all stakeholders. This achieves buy-in and ensures consensus in embracing change.
- Constantly guide the process by reviewing and revising plans thus formulated as you go along. This calls for flexibility on your part (as a woman manager) and great understanding that change is not static. You will need to adapt to situations as they are encountered along the way.
- Because situations change, a constant experimentation with ideas is required in re-evaluating plans and processes and making adjustments where and when necessary. This will support management's focus and will highlight new priorities that arise.



#### CONTEXTUAL CONSIDERATIONS IN CHANGE MANAGEMENT

Change does not happen in a vacuum, and as such, the woman manager needs to be sensitive to contextual factors in driving change. The following variables therefore deserve careful attention:

- The organisational culture and environment should encourage productive processes. Learning should be encouraged, systems should be equitable and fair, competences should be rewarded. Diversity in the educational sector should be recognised and all stakeholders should be part of the environment. Participation by all should be encouraged and there should be no intimidation whatsoever.
- Structures that promote democracy should be in existence, known and understood fully.
   These should be accountable and encourage communication among the various stakeholders.
- In the management of information, those having access and control over information are often reluctant to share it. The more information is shared, the more people seek your assistance. In this way, individuals in an organisation seek to learn and find out more. This promotes continuous improvement amongst staff and the education of learners.



# **UNIT 3:**

## MANAGING HUMAN RESOURCES

The management of human resources is a delicate process since people are key to all that has to happen in the organisation, and perhaps the most important resource that managers have to deal with.

#### **UNIT OUTCOMES**

At the end of the unit, participants should be able to:

- Understand the relationship between the DoE strategy and the DoE human resource management.
- Appreciate the complexity of human resource management processes.
- Appreciate the legislative nature of management of human resources.

## WHAT IS HUMAN RESOURCE MANAGEMENT?

Human resource management involves all policies, decisions and practices that directly affect or influence the employees in an organisation. In recent years, increased attention has been devoted to how organisations manage human resources. This increased attention arises out of the realisation that without its employees any organisation will not achieve its goals, making therefore the management of the human resources critical for the success of an organisation.

It is important, therefore, for a woman manager to understand that for educational institutions to be effective, a variety of competencies are required, viz. competencies to manage the physical infrastructure, finances, human resources and processes to mention just a few. The task of managing the education enterprise, requires skills, knowledge, judgment and creativity. The human resources and how people are managed, is one of the critical predictors of overall success of DoE through the PDEs. Effective managers tend to find unique ways of attracting, retaining and motivating employees and it is these critical success factors that will enable schools, district offices, PDEs and eventually DoE to deliver on the mandate of educating the nation. There is a proven direct link between employee satisfaction and customer satisfaction (communities in this case). Effective managers put all their energies into supporting employees because they satisfied employees are in a better position to satisfy their clients.

Further, woman managers need to know that satisfied employees do not change employment as often and this reduces staff turnover. Similarly, motivated employees complain less, resulting in fewer grievances and arbitrations that can be huge time wasters. The biggest challenge that managers face is that of seeking innovative ways to treat employees not as a cost but as an asset that increases in value over time, within the parameters of policy provisions. Achieving employee commitment to DoE's objectives is a huge challenge. Bob Collins asserts that 'when people believe in what they are doing, see it as worthwhile, and see value from it, they'll put their heart and soul into the work'.



#### CASE STUDY

There are few opportunities for career advancement to upper levels of management within the education establishment. While the teaching profession is overwhelmingly a female dominated profession at entry level, representation of women in the decisionmaking positions is poor. You have observed a great outflow of capable colleagues leaving for other countries and you have no intentions of leaving.

You recently applied for a position that would have allowed you to advance to the highest decision making rank within your school/district/province, etc. You feel you meet all requirements and your performance reviews in the past have been very positive. You expected to get the position but did not, in favour of a male candidate. Passage gossip has it that you lack experience necessary to deal with issues of managing resources. You know that this is true. What are you going to do to address the problem?

#### ISSUES OF STAFF MANAGEMENT

It is expected of a woman manager to understand that the management of staff is a complex matter that requires familiarity and compliance with these pertinent pieces of legislation:

- The Labour Relations Act.
- The Employment of Educator's Act.
- The Public Service Act.
- The Public Service Code.
- The Basic Conditions of Employment Act.
- The Occupational Health and Safety Act.

In addition the woman manager should be well versed with pertinent government policies as well as the Resolutions of the Public Sector Bargaining Forum and the latest HRM Resolutions. (Refer to the Woman and the Law Module)

It is important to execute the various functions within the parameters of legal provisions if the woman manager, as a representative of the employer is to minimise chances of litigation. Furthermore, the practice of keeping staff satisfaction levels high leads to better productivity. This has been found to boost staff morale which in turn leads to higher levels of commitment, thereby prompting staff to make an optimal contribution to the organisational success:

#### PLANNING AND DEVELOPING A STRATEGY

Despite the fact that the SGB is responsible for the school governance, the woman manager with her staff must take a leading role in influencing the decisions and overall plans of the school and in planning a strategy. The importance of involving staff proactively to influence policy direction cannot be overemphasised. This helps iron out misconceptions and makes staff feel included and part of the decisions. This is crucial in overcoming possible resistance. After all, the responsibility for implementing the strategy lies with staff, e.g. if the school is planning to increase pupil intake, the first consideration to be made should be the implication of the plan.



## **HUMAN RESOURCES PLANNING**

The filling of positions or the process of acquiring human resources only follows once the staff needs have been determined. This process includes recruiting applicants, screening and selecting the most qualified candidates, and filling some positions through transfers or promotion. This process is highly regulated by the Employment of Educator's Act and other pertinent pieces of legislation for non-educators. The process has become very complex over the years with the legislation that protects even job applicants. The Employment Equity Act and a myriad of labour laws have to be adhered to in terms of both recruitment and selection processes (Refer to the Woman and the Law Module).

### BUILDING INDIVIDUAL AND ORGANISATIONAL PERFORMANCE

Many individuals join the DoE because of the potential they see in developing and moving up the ladder. For the progress of both the DoE and the individual, it is the duty of the HR directorate to make sure that the necessary interventions are in place, especially since the world has become very competitive and dynamic. A substantial amount of the Departmental budget has to be set aside for the development of employees. The training to be provided might be formal or informal, and must be properly co-ordinated. In some cases, employees may be sent out on training programs offered by professional associations or universities. The Training and Development initiatives that the Department embarks upon should be within the confines of the Skills Development Plan of the Department. It is important for women managers to realise that they can only manage staff performance within the parameters provided by Departmental policies and procedures

#### **REWARDING EMPLOYEES**

Various managers determine employee performance in a number of ways, but the most common is the performance appraisal, which comes in a variety of forms. The appraisal process, the performance to be measured, the procedures to be used and ensuring accuracy and the requirements for discussion of appraisal results is important since they may influence opportunities for advancement. Performance appraisals are not a favourite of both the employers and employees, yet they have to be done and done timeously and accurately. Bear in mind that the laws that govern compensation processes, payment levels, pay parity, etc. that form part of the compensation and reward system of the Department are determined by DoE. Over and above the Departmental reward system, the women managers can encourage good performance by developing habits that encourage good performance, e.g. recognising by way of mentioning staff who have gone an extra mile, inclusion in the newsletter, a brief article about star performer of the month, quarter etc. Even basic courtesy like thank you notes go a long way in keeping staff motivated.

## MANAGING RELATIONSHIPS

Because inter-personal relationships play an important role in all aspects of our lives, it is important to nurture and build strongly on these. For example, as a member of SMT, you may be called upon to represent your school in outside meetings or at sporting events. This is where you make a good name for your school, and build rapport with other people who may be at a higher position of authority. Managing relationships has both internal and external components. It is important that a women manager maintains good internal relationships with all stakeholders and that she treats them with respect and dignity.



#### MANAGING CONFLICT

Once relationships have been established, it is important that they are nurtured and managed amidst different points of view. Conflict is inevitable where people are involved, and women managers need to sharpen their skills in this area. Even with best relationships, conflict is bound to happen from time to time. Conflict and disagreement are not necessarily bad. What becomes crucial is how it is handled. Conflict, which is a situation that arises when ideas clash or collide, at times when a disagreement with another person's viewpoint occurs, can be caused by a number of things including misunderstandings, jealousy, struggles for power, a lack of co-operation, etc. Before one can deal with conflict, it is important to understand the cause. Various models for conflict resolution have been developed but all stress the need to identify first the causes and the fact that it should be dealt with immediately. As a manager, you will be faced with these on a daily basis.

Understanding the personality dynamics of the people you work with as well as the specific issue to which the conflict relates is crucial. There is no one method of handling conflict, as the dynamics of the situation, the personalities of the conflict manager, as well as individuals in a conflict situation will dictate what the best way to deal with the conflict will be.

#### **EXAMPLES**

**SCENARIO 1**: Suppose conflict arises from the fact that you, as a woman manager, did not give correct information about the due date of a report required by the district office. An educator who has a reputation of bullying is responsible for coordinating the write up of that report and he insists that he is unavailable for writing the report because he has budgeted his time according to the time frames given in the original instruction. What will be the best way to handle this conflict?

**SCENARIO 2**: Despite the minutes of the previous SMT meeting reflecting so, one educator out of twelve insists that the task was not assigned to her. She has a known history of bullying and since she joined the staff about a year ago, you have always had a suspicion that she does not like to be told what to do or to be monitored and supervised f. You feel she is holding the meeting to ransom and other staff members are getting restless. How would you handle this situation?

#### TIPS FOR RESOLVING CONFLICT

- Attend to the situation immediately.
- Deal with the specific issue and avoid bringing up the past.
- Seek to understand the other party's point of view.
- Avoid being judgmental.
- Face the conflict head on without being confrontational.
- Handle people sensitively if you want to minimise conflict situations.
- Stick to the facts.
- Do research on the area before attempting to resolve conflict. You should be informed about issues relating to the conflict situation.
- Involve all parties directly affected after the conflict has occurred.
- Where possible, aim for a win-win situation and not a win-lose situation.



## UNIT 4:

## MANAGING FINANCES AND OTHER RESOURCES

#### **OUTCOMES**

At the end of the unit, participants should be able to:

- Appreciate the technical nature of finance management.
- Understand the importance of compliance with PFMA and SASA when it comes to management of school finances.
- Understand roles, responsibilities and scope of the mandate for managers.

#### MANAGING FINANCES

The enormous challenges facing government are such that the financial allocation made for the Department of Education is invariably insufficient to cover all expenses that must be met. In an effort to make up the difference, parents are required to pay school fees for learners at public schools. School fees may be paid:

- Only when the majority of the parents agree that it is to be paid.
- Approve the school fee amount.
- · Equitable rules are applied.

To supplement these funds and to cater for other needs including bursaries for learners whose parents cannot afford to pay school fees, the SGB has a responsibility to raise funds from other sources.

Since this is a legal responsibility, the woman manager, as part of the SGB, has a responsibility to find ways of raising funds. Many schools run cake sales, stage school fetes, and or host food stalls and tuck shops especially during sporting events. The SGBs have been known to call for help from alumnis and parents of learners who now occupy senior positions in organisations they work for.

Other monies that may come into the school may come in the form of donations from individuals or private companies, and trust money, which is given to the school in trust. This money is to be used only for a specified purpose.

It is the duty of the SGB to make sure that funds as accumulated are:

- Banked in the name of the school with a reputable registered bank.
- Administered in terms of the rules of the HoD, and as such, it is important that you as the manager, always keep and update yourself with the new set of rules and observe them.
- · The records of such monies, i.e. both income and expenditure are kept accurately.

It is your duty as a manager of the school and as a member of the SGB to make sure that the annual budget is formulated on time before the start of the new school year, and that the budget reflects anticipated income and expenditure by the school for a particular year.



#### TIPS FOR FORMULATING A BUDGET

Before you formulate a budget, the following need to be done:

- Assign a smaller task team to attend to the compilation of the budget.
- Make sure you have all the financial information available. Include allocations by the State, possibly school fees for the following year and all items of likely expenditure.
- Include guidelines to be used in compiling the budget as provided by your province.
- Your budget should reflect the strategic priorities of your school/office, etc.

Once the budget has been formulated and referred to the SGB for provisional ratification, it then needs to be referred to the general meeting of parents, and approved by the majority of parents present at the meeting.

#### **UTILISING THE BUDGET**

Having completed the process of getting the budget approved is only a starting point. As a woman manager of the school, you must ensure that:

- Records of expenditure and income are accurate and safely kept.
- Financial statements are prepared yearly.
- Financial statements are audited.
- The HoD receives the audited financial statements within six months.
- The financial statements are available to all who would like to view them including parents and learners.

#### MANAGING OTHER RESOURCES

Other resources to be managed include assets, both fixed and movable, e.g. land, buildings, cars, and equipment like computers, laboratory equipment, etc. There are resources that are made available to schools by the Provincial Departments. In order to promote efficient and effective utilisation of scarce resources, it is important that school managers manage and control the utilisation of these resources. Furthermore, Districts distribute to schools Learner and Educator Support Materials that address specific identified needs. There should be adequate record keeping and monitoring of these materials as well. In procuring those materials that are not supplied by the Provincial Departments, it is important that the principle of the efficient utilisation of public funds be upheld by districts and those schools that have a Section 21 status.

In ensuring protection of school assets and to curb instances of vandalism, the school needs to inculcate a sense of community ownership. The woman manager needs to initiate activities that will make the school a centre for community life. This extends the responsibility for protection of school assets all the way to the community.



## **CASE STUDY**

The principal is at loggerheads with the chairperson of the SGB because she feels that the arrangement that the chairperson be a signatory to the school's bank account is counterproductive. Her major source of dissatisfaction is that the chairperson is often not available for signing transactions because he travels extensively for his business. This, the principal believes, compromises productivity and efficiency in the school. How would you deal with this problem given the statutory obligations of the SGB.



# UNIT 5:

## MONITORING AND EVALUATION

#### **OUTCOMES**

At the end of the unit participants should:

- Understand the difference between monitoring and evaluation.
- Be in a position to put in place mechanisms to monitor performance of their own divisions/schools.

#### **DEFINITION OF TERMS**

### What is monitoring?

Monitoring is an ongoing review of progress made in the implementation of agreed upon plans. This ideally should be done at agreed upon intervals. This helps identify areas for improvement as projects unfold, and it prevents nasty surprises at the end.

#### **EXAMPLE**

Suppose in the quest to improve matric results school X decides to solicit assistance of the neighbouring university for Saturday classes offered by the senior university students. In order for this project to work well, the school must retain the ownership of the project and must put in place a mechanism to monitor the project on an ongoing basis, e.g. monthly. Typically, the following questions must be asked:

- · What ground have the tutors covered?
- Is the ground covered in line with the syllabus?
- What is the attendance rate of learners?
- Are the times during which extra lessons are offered, convenient for the learners?
- Are the tutors giving correct information?
- Is the performance of learners attending extra classes improving?

## WHAT IS EVALUATION?

Evaluation in the education set-up typically looks at overall achievement of the school/district office goals and objectives after a defined duration of time. Typically, this should be determined by the duration of what is being evaluated, e.g. for educational achievement purposes, a year's duration is justified as an interval at which this type of evaluation is to be done. However, for longish process type activities such as skills development this may require that it be done at 3 year intervals.

An evaluation can be looked at as a form of post mortem in that it seeks to establish:

- What have we done right and why?
- What have we done badly and why?
- How can we improve
- Is the improvement attained significant?
- Can the improvement be explained by what we did?



Monitoring and evaluation needs to be adopted as a culture that enhances the principle of continuous improvement. It does not only help you assess success on what was undertaken but helps the organisation evolve by learning from mistakes made in the past. It aids the organisation in preparing for the future because gaps and loopholes are identified

Because monitoring and evaluation are by nature very sensitive, as many people as possible should be involved in preparing the framework for monitoring and evaluation. Consensus needs to be sought and achieved. The "what' to be done, the "when" and by "who" should be outlined very clearly. Similarly, the effects of the monitoring and evaluation procedures also need to be analysed.

The nature or method of evaluation can follow that of need identification process, that is:

- · Questionnaires.
- Surveys.
- Interviews.
- · Observation.

It can use any or the combination of any of the above, depending on the nature of the outcome sought, the tools available and the circumstances at hand.

#### WHAT IS IT THAT YOU MONITOR AND EVALUATE?

Monitoring and evaluation presupposes the following

- · A set of common goals exists that are share d by all.
- These goals have been broken down to concrete achievable objectives.
- Actions to be undertaken have been identified and assigned to responsible offices/individuals.
- · Intended outcomes are identified.

# MONITORING AND EVALUATION BECOMES AN EFFECTIVE TOOL OF DETERMINING WHETHER:

- The objectives are being achieved.
- Achievement of objectives happen within prescribed time lines.
- Any intervention is needed to get back in track.
- The identified outcomes are being reached.

#### TYPES OF EVALUATION

In order to be able to select the correct type of evaluation for her projects, it is important that the woman manager understands the various types of evaluation and when these can be used. The three commonly used are:

- On-going throughout the lifespan of the project.
- Monitoring and evaluation at the end of the project.
- Impact assessment conducted long after the completion of the project.

Different methodologies of evaluation are considered appropriate for different sized projects. Ongoing evaluations are usually applied to long-term projects. Medium and shorter-term projects usually adopt some form of formative or summative evaluation.



## General meeting to solicit learner input strategic objectives exercise using the Continue with this INTERVENTIONS minutes of study RCL to convene Add another 30 **Emergency PTA** of your school/ NEEDED meeting office. time NOT ACHIEVED Not achieved ACHIEVED / Quarterly review of DATE OF REVIEW learner perform-End 1st Quarter ance overall improvement of matric pass rate ment every quarter culminating in 15% Gradual improve-OUTCOMES informing parents of attendance rates by Introduce compulsory supervised study resources for the non attendance Improve school Start Saturday sessions after Obtain extra school M-T ACTIONS classes library rent academic year 15% by end of curresults by at least Improve matric OBJECTIVE

EXAMPLE OF A MONITORING TOOL

Continue with this exercise using the strategic objectives of your school / office.



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

#### THE THEMES AND THEIR RELATED MODULES ARE:

#### Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better

as interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

## Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

## Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication

Module 10: Group and Team dynamics: Women managers building effective teams.

#### Theme four: Administrative Modules

Module 11: Written Communication

Module 12: Conducting Productive Meetings



## PREFACE: EFFECTIVE COMMUNICATION

Communication is a subject that we are exposed to almost every minute of our lives, yet however much we would like to claim to know it well, it turns out that we know very little about it. This is because the subject is very complex.

Communication is a vital component of all spheres of our lives. As such, it needs to be managed. What happens most of the time is that communication is ineffective.

In the old management practice, for example, communication was not seen as a two-way exchange process, but rather as a directive from the top. No consideration was given to those for whom the communication was intended and their views were disregarded.

Today, many changes have taken place, and communication plays a vital role in educational institutions. Among the changes that have taken place, for example, is the increased complexity both in structure and technology. This applies even to the smallest and most rural schools. This has resulted in increased communication channels and difficulties.

Government legislation within the educational setting has brought about many changes that call for effective and careful communication in order to eliminate misunderstandings and ensure that staff takes full ownership of the developments introduced.

This module attempts to cover important aspects on the topic of communication and strategies involved in the communication process that women managers need to be aware of if they are to succeed in managing well.



## **EXPLANATORY NOTES:**

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FACILITATOR'S INPUT/NOTES

This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.



**HINTS** 

This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.



**ROLE-PLAY** 

This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who participated actively in the exercise.



**EXERCISE** 

This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired skills to a practical situation.



**CASE STUDY** 

This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or module to come with a solution.



**SELF-TEST** 

This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.



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#### INTRODUCTION

The ability to communicate effectively is one of the major cornerstones for success in life. Effective communication enhances the communicator's chances to lead and contribute favourably in their areas of influence, while advancing in their careers. The role played by communication in executing managerial and leadership functions is so crucial that all the other skills and competencies acquired by a woman manager can be compromised if her ability to communicate either verbally or in writing is neglected or not well developed. Your credibility as group leader, facilitator and co-ordinator, etc. depends substantially on how clearly, appropriately and effectively you express your views. A badly delivered message, whether in the form of a written letter, memorandum or an ill-considered and poorly presented report can create damaging impressions about your competence and professionalism.

This module approaches communication from a broad perspective that addresses intra-personal and interpersonal communication, through verbal, non-verbal or written modes. It helps to illustrate the point that effective communication skills enhance managerial skills.

This module is divided into two sections:

Section A: Verbal Communication
Section B: Written Communication

#### **DEFINITION OF COMMUNICATION**

Communication is commonly defined as an ongoing, infinite and vital process of the need for all living organisms to survive through the successful exchange or "the transmission of meaning", whether internally, or from person to person. When we consider our personal thoughts, we are said to be talking to ourselves or engaging in intra-personal communication. Interpersonal communication on the other hand, is "the transmission of meaning from one person to another" where at least two persons must be involved. (Shuter, 1979).

From this definition, it is clear that communication is not an end in itself, but rather a means to an end. Managers need to communicate in order to:

- Give information
- Receive information
- · Expedite work in the department
- · Correct misconceptions
- Deal with grievances
- · Liaise with outsiders
- · Co-ordinate their teams

## **BROAD AIMS OF THE MODULE**

This module will help you to:

- Understand what communicating effectively means.
- Distinguish between the various communication media available.
- Select an appropriate communication medium for a given situation.
- Understand what self-talk is and how it can help one achieve the desired results.
- Help women acquire practical skills to enhance their communication strategies.
- Explore the processes involved in intra-personal, interpersonal, non-verbal and verbal communication.



## **ASSUMPTIONS**

- Effective communication, through the written medium, can occur only if there exists a well-defined communication system that links constituent parts of the organisation that initiate, distribute and execute instructions.
- A good internal communication system will ensure that employees are well informed about current events and the intention of management. In turn, employees will be encouraged to receive, to gather and to share information.
- The Department of Education, together with Provincial Departments, rely heavily on written communication in the form of letters, memoranda, reports, pamphlets, notices, etc.
   As such, every constituency in the education establishment should have a well-developed communication system.
- Managers are expected to aptly manage information within their immediate areas of responsibility.



#### **SECTION A: VERBAL COMMUNICATION**

## []NIT 1:

#### UNDERSTANDING COMMUNICATION AND COMMUNICATION PROCESSES

#### **OUTCOMES:**

Having completed this unit, women managers should have learned how to:

- Define communication.
- Appreciate elements in the communication process.
- Use effective communication to their advantage.
- Internalise the principles of communication.
- Appreciate the role played by factors such as political correctness, gender, cross-cultural factors and personal aspirations on communication.

#### **VARIOUS TYPES OF COMMUNICATION:**

#### Intra-personal communication

When we consider our personal thoughts or talking to ourselves, so to speak, we are said to be engaging in intra-personal communication.

#### Inter-personal communication

This, on the other hand, is transmission of meaning from one person to another person.

## Small group communication

This refers to conveying or transmitting meaning to a few individuals. Here, minute details of the message can be conveyed and the practical considerations, e.g. size of the venue, vocal inflections, etc. are not vast.

#### Mass communication

This refers to the transmission of a message to a vast group of people, e.g. the principal addressing the school assembly during a crisis situation, or the chairperson of the School Governing Body calling/addressing a mass meeting.

In the last instance outlined above, serious considerations need to be made regarding the voice pitch, venue size, and issues to be discussed.

There are various ways of transmitting messages – by means of one's voice, gesture and facial expression. But why do we need to communicate?

- To express our feelings.
- To state our wishes and aspirations.
- To share information.
- To make our needs known.

#### **ELEMENTS OF COMMUNICATION**

The following are the broad elements of communication:

#### Ongoing

Communication has no beginning and ending.





As communication is a tool used in presenting issues, it has dynamic demands and will change according to situations/circumstances and times. For example, it is unheard of in some cultures for a woman to stand up and address men. In other cultures, this is practiced and promoted.

There are a number of new tools that can be used to communicate effectively and efficiently these days, including e-mail, SMS, telefaxes, teleconferences, etc.

#### Multi-directional

In the sense that one can be doing a lot of things, e.g. listening, talking, watching TV, and frowning all at the same time. The woman manager, especially in the context of the busy world of today, needs to take into cognisance this aspect/element of communication which, if well mastered, can prove to be very handy.

#### **ELEMENTS IN THE COMMUNICATION PROCESS**

David Berlo characterises the interpersonal process as having four basic elements: the source, the message, the channel and the receiver.

#### The source

This is the person who initiates, or sends the message, but if the communication is both ways, both the sender and the receiver serve as sources. Each source brings to the communication process a unique combination of attitudes and knowledge that affect the communication process.

#### The message

This is the content of the communication or the meaning that is transmitted from one person to another in the form of symbols, language, expressions, vocal inflexions or a combination of these.

#### The channel

This is the method or medium used to transmit the message, in principle, being sounds transmitted via airwaves. While talking to somebody over the phone this is the only channel available to you, but when you engage in face-to-face interaction, much more information may be sent through the visual modality. It is important to note this distinction between the verbal or linguistic and the non-verbal channels.

#### The receiver

This is the person or persons for whom the message is being communicated, but as earlier stated, in a two-way exchange, each participant functions as both the source and the receiver, and each with a unique set of qualities that influence the message.

#### THE IMPORTANCE OF EFFECTIVE COMMUNICATION

We cannot over-emphasise the importance of interpersonal communication in our daily lives. We are consistently engaged in interpersonal communication from the day we are born. Essentially, interpersonal communication is what separates humankind from animals. It is therefore imperative that we develop sound interpersonal communication skills or strategies. If we communicate effectively, we achieve the following:



- Needs, wishes, aspirations or feelings are clearly stated.
- The person we communicate with understands clearly what we expect.
- Others understand exactly where we stand on an issue.
- Lack of ambiguity about what one wants enhances the chances of getting what one wants.

#### ADVANTAGES OF COMMUNICATING EFFECTIVELY

It is not only reasonable, but also invaluable to communicate.

- Knowledge is power and the more the woman manager effectively gives and receives information, the more power she commands, since she lives in the information age.
- The knowledge explosion makes it imperative that we send and receive information.
- The complexity of the organisation that we work for, the DoE, makes it impossible for one person to know everything at first hand. Information must therefore be obtained from others.
- The more information your staff receives, the better prepared they are for their work-challenges.
- For women managers to stay effective in decision-making, it is important that they offer information and remain receptive to ideas offered freely by others.

#### **EXERCISE**

Why do we communicate? How do you think communicating effectively can enhance the position of women managers?

#### FACTORS INFLUENCING COMMUNICATION

There is a need to understand differences in communication approaches between men and women. It is said that women communicate to get a closer understanding of their partners, while men communicate to entrench their importance. A woman manager would need to be aware of barriers that prevent her from attaining certain goals in life. What might be the reason preventing a woman manager from getting to the top professionally? Ineffective communication may be one such barrier.

## Other barriers have been identified as:

- One's gender and socialisation.
- · One's political inclination.
- Cross-cultural behaviour and habits.
- Personal aspirations and personal styles, i.e. style of expressing oneself, both verbally and non-verbally.

#### COMMUNICATION BARRIERS BETWEEN WOMEN AND MEN

Deborah Tannen outlines fundamental differences in the manner that men and women approach communication. While women communicate to create connection, men do it to emphasise separateness and differences. Women speak and hear a language of intimacy and closeness, whereas with men, it is the direct opposite.



SELF MANAGEMENT

Men will seldom talk, but women are said to be going on and on about their problems. This is because they view talking about their problems as a way of promoting closeness. Also, women are often criticised of always being apologetic, while men view saying, "I am sorry" as a serious weakness.

#### POLITICAL CORRECTNESS

In an effort to be politically correct and sensitive to others, communication has become belaboured by distorted meanings. In referring to the blind, the disabled or the deaf we have adopted phrases such as 'visually impaired', 'differently-abled' or 'physically challenged' and 'hard of hearing' respectively. This over-sensitivity has had the effect of distorting our communication. Words like 'death', 'quotas', 'dwarfs' and 'women' have been replaced by phrases such as 'negative patient care outcome', 'educational equity', 'vertically challenged', and 'people of gender'.

#### **CROSS-CULTURAL COMMUNICATION**

This refers to the extent to which some words may have a different connotation to people from different cultural backgrounds. For example, it is still taboo in some cultures to talk about sex. This presents the woman manager with an additional challenge if such a subject were to be addressed in communicating with a cross-cultural audience.

Because of the woman's own cultural perspective, the burden of communicating effectively with a cross-cultural audience on sensitive topics becomes even more onerous.

#### **EXERCISE**

Various departmental HoDs have been called to a meeting where staff retrenchments are to be discussed. You are one of the HoDs at the meeting. The tensions are high in the room since no one is immune.

The meeting is not well-structured and participants, all of whom are male except yourself, have been throwing ideas at random.

You make two strong points, but no one responds. It is as though you did not even speak. Then, the person who is seated next to you makes the same suggestions that you have made before and suddenly, the room is abuzz. Everyone is immediately interested and that person gets all the credit and attention that should have been given to you.

It is not the first time that this has happened, and recently it is happening with more frequency, adding more insecurity about your career with the institution. What do you think is happening, and why? How can you remedy the situation?

- What do you think are the barriers to communication?
- Can you think of other barriers other than those described above?
- Share with the group the way one or more of these barriers recently affected you.



# UNIT 2:

## COMMUNICATING WITH YOURSELF

Communicating honestly with oneself is an important first step, i.e. the foundation, of communicating with others. In order to communicate with the outer world, you have to begin within yourself. This is sometimes referred to as intra-personal communication.

#### **OUTCOMES**

Having completed this unit you will:

- Understand the role of self-talk in our everyday life.
- Understand modifying negative self-talk.
- Be able to recognise and explore your feelings, needs and capabilities.
- Present yourself favourably and positively to others.
- Be able to use self-talk to practice dealing with real challenges.
- Develop positive self-talk.

#### LISTENING TO YOUR INNER VOICE

Everyone has an inner voice that they listen to with varying degrees of attentiveness. Our actions reflect the inner voice. The inner voice plays the following roles:

Self denigration	versus	Elevating self-confidence
Creating anxiety	versus	Calming effect
Encouragement	versus	Discouragement
Cheer-leading	versus	Giving up

For self-talk to enhance effective communication, it should meet the criteria of objectively acknowledging what has happened as well as an objective exploration of the reasons. For example, "my school did badly in the final exams", as matter of fact. "A combination of factors, including lack of parental involvement, lack of good management, lack of discipline among learners and teachers jointly, all added up to produce such results. All these factors need to be addressed in order to achieve greater success in future," as an example of an objective exploration of the reasons.

### EXPLORE WHAT YOU NEED TO DO DIFFERENTLY AND DO IT

Self-talk under such circumstances becomes positive without shifting the blame or trivialising what has happened, as in "I made mistakes from which I have learned. I will do better next time."

This approach is different and gives different results from the approach "no matter how hard I try, I do not get the results. So what is the point?"

It is important as a manager to be aware of these voices, the role that they play in the way managers present themselves, and how these affect the image projected to others.

#### **ACTIVE LISTENING**

Active listening can be defined as direct engagement of the receiver of the message with the giver of the message. The foundation of active listening is paying undivided attention. This allows the listener to:

- Hear the message.
- · Interpret the message.
- Interpret non-verbal cues.

At work, people often listen passively, which is characterised by the listener being minimally engaged. There are a number of reasons for this behaviour, namely:

- Thinking that nothing of importance is being said.
- · Having more accurate sources of information.
- Reliance on other people for clarification of messages.
- Know-it-all attitude: 'What can he/she tell me?'

Women managers can become active listeners by:

- Concentrating on the sender of the message.
- · Being and acting attentive.
- · Listening in context.
- Giving verbal and non-verbal feedback.
- Using perceptual checks listening to your perception against the speaker's intention.
- · Blocking out competing messages.

This type of listening greatly increases the chances of seeing and hearing the real message. An active listener is able also to distinguish between the cognitive (statement of fact) and the affective (emotional) portions of the message and knowing how to listen to both. Words like "believes", "prefers", "chooses" and "thinks", are examples that indicate emotional content in a message, whereas, statements like the following: "Schools X, Y, and Z had a pass rate of A, B, and C" or "based on an enrolment of X learners, we need Y number of classrooms," are statements of fact and therefore cognitive in nature.

#### **SELF TEST**

At your next meeting, don't take any notes. When the meeting is over, write down what you think the major points were. Then ask a co-worker to tell you what he or she thought. Compare similarities and discrepancies. Do the same at another meeting, but wait until a day or two later to write down your impressions of the main points.



# **UNIT 3:**

## PRINCIPLES OF COMMUNICATION

#### **OUTCOMES**

After completing this module, participants should:

- Understand the principles of communication.
- Be able to monitor their own communication patterns in the light of knowledge gained.

#### PRINCIPLES OF COMMUNICATION

There are several underlying principles affecting every communication situation that women managers need to take into account.

## THE UNIQUENESS OF EACH COMMUNICATION SITUATION

No communication situation can be imitated or repeated. Behaviour will vary according to people and situations. Intelligence and thoughtfulness are required to fit and adapt the basic principles into each circumstance. Sometimes, you have to break old conditioned responses in order to develop a repertoire of strategies that can be at your command for each situation. A raised tone of voice, for example, may achieve the desired objective in one situation and be entirely disastrous in another. Effective communication suggests that the communicator will be constantly alert, not only to what is said, but also to that which is unsaid, and constantly adapting accordingly.

#### FEEDBACK ON ONE'S COMMUNICATION

Without receiving feedback from people you communicate with, you will never know whether you are getting your message across. If feedback is not forthcoming, ask for it. In a meeting situation, what does it mean when colleagues start to pass each other notes, when they start doodling, rolling their eyes or frowning?

#### **FACE-TO-FACE COMMUNICATION**

When a receiver is not in front of you, it is most difficult to obtain feedback or the feedback that is received can be incomplete. The manager who relies heavily on written communication is cheating herself of immediate visual and verbal response. Decide on the mode of communication on the basis of the objective to be attained. In certain situations, written communication will do and may be the absolute requirement, and in others, a totally different approach may be necessary. It is important to be able to decide on the best possible method of getting your message across, e.g. in cases where policy decisions taken by head-office, provincial department/national department are to be conveyed. However, to gain insight into what people feel and think about certain issues, face-to-face communication may be the best.

## DISTRACTIONS CAN GARBLE YOUR MESSAGE

The receiver or the sender can become distracted during the communication process and so miss the message. Managers should attempt to control distractions. This is why it is best to be away from noisy situations when messages are to be sent. Always make a conscious effort to do one thing at a time, e.g. speaking on the telephone while trying to keep track of something else can detract your attention and lead to miscommunication.



#### **COMPLEX COMMUNICATION**

The more the people are involved, the more complex communication becomes. The more receivers you have, the harder it is to tailor your message for each one. At the same time, it is more difficult for each receiver to provide you with the necessary feedback. The reality of the educational manager's situation is that more frequently, they have to communicate with groups rather than one-on-one, e.g. addressing a staff meeting, addressing learners, addressing parents' meetings, interacting with the School Governing Body, etc. It is essential that under such circumstances, women managers communicate effectively by:

- Understanding the topic to be discussed.
- Presenting the speech/talk in a manner that is clear.
- Making use of language that is in line with the level of understanding of their audience, e.g., language used to communicate with learners should differ from the language used to communicate with other teachers or the officials from the district office. The level of success achieved in communication depends largely on the appropriateness of the lanquage used.
- Reading her audience as she moves along.
- Striving to take her audience along, and stopping if she gets signals that her audience does not follow.

#### **EVERY MESSAGE CONTAINS BOTH INFORMATION AND EMOTIONS**

Women managers need to be aware of the messages both sent and received. Women are generally more emotional than their male counterparts. It becomes the responsibility of each woman manager to be aware of her own emotions and to work on controlling them such that one gets the message across as clearly as possible. Being overwhelmed by emotions blurs reasoning and often leads to incoherent communication. The woman manager must be aware of those situations in which she reacts emotionally. Every time such a situation is encountered, take a deep breath and ask yourself if you are reasonably in control of the situation and able to address it now. If not, take a break.

#### **WORDS ARE SYMBOLS**

Words are symbols used to express thoughts and they are always open to interpretation.

## **LANGUAGE**

Language is a coding system, which has no meaning other than what society assigns to it. But because people are diverse, this further complicates the process of communication. Hence communicating well with diverse groups of people needs to be mastered carefully in this multi-cultural country.

#### **SELECTIVE PERCEPTION**

Selective perception happens when a person chooses to focus on one aspect of the total message. This often leads to misconceptions as the interpretation attached to the message is out of context. Selective perception is by definition incomplete perception, which must be avoided at all costs. Because women are deemed to be emotional and more affected by hormones than their male counterparts, they should strive to perceive the whole picture, otherwise they often run the risk of being labelled emotionally unstable.



#### AVOIDING SELECTIVE PERCEPTION

- Do not jump to conclusions.
- · Whenever you doubt your own understanding of the issue, ask for clarification.
- Encourage others to do the same.
- Read the non-verbal language of people you interact with a frown at a message that does not warrant frowning, may be a sign of misconception.
- Always look at the bigger picture. The key is to value individual differences and in fact encourage them. Because people view things differently, it follows that, if encouraged, diversity will provide multiple solutions to a problem. You get a wide spectrum of solutions to the problem with each individual approaching it from a different angle.

# PEOPLE COMMUNICATE ACCORDING TO THEIR EXPECTATIONS OF A SITUATION

Problems arise if one's expectations about a communication situation are different from reality or from the expectations of others. It is never wise to pre-plan and rehearse every word. But it is always wise to check to see if the expectations of others match yours and to clarify expectations before pursuing a discussion.

#### MISUNDERSTANDINGS CAUSED BY MISTRUST

Trust is the foundation for effective communication. Increased communication will not make up for lack of lack, irrespective of the number of times one may communicate. If trust is identified as a reason why you do not get your messages across to your audience, deal with the trust issue first before seeking to increase communication. Find out why is it that people do not trust you, and find out what you can do/should do to address the trust issue.

#### **EXERCISE**

The following exercise can be done in pairs or individually. It has to be stretched over a period of four days during which observation of a few characters can be made. Record your observations in as fine detail as possible and discuss them in your groups during subsequent lessons.

Try to take a day when you interact with a lot of people. Chat with them and record the information you received from them. See if you are basically a sender or a receiver of information, to or from whom, and under what circumstances?

Take one of the face-to-face communication situations during the next week, use words you know the person will understand and then ask for feedback. Does he or she agree? What does he/she think?



# **UNIT 4:**

## NON-VERBAL COMMUNICATION

#### **OUTCOMES**

Having completed this unit, women managers should be able to:

- Identify non-verbal communication.
- Appreciate the role of non-verbal communication.
- · Use and interpret non-verbal language in order to communicate effectively.
- Be able to read non-verbal communication.

#### WHAT DO WE MEAN BY NON-VERBAL COMMUNICATION?

This refers to "the transmission of meaning from one person to another through the use of non-word symbols", and is divided into three branches: the kinetics, the proxemics and paralanguage.

Most of us do not think about it too much, but a substantial portion of our communication takes place non-verbally. Although we tend to take non-verbal communication for granted, experts maintain that in a face-to-face interaction, about 90% of the message transmission process occurs at the non-verbal level. While we cannot confirm the accuracy of these figures, the indication is that a great deal of information is exchanged via non-verbal channels.

**Kinesics** focuses on what is popularly called the "body language," i.e. gestures, facial expressions, eye contact, postural variation and touch.

**Proxemics** is concerned with communicative manipulations of social distance or territoriality. **Paralanguage** focuses on various aspects of vocalisation that are not verbal, such as inflection or tone.

Although we do not pay much significance to non-verbal language, it has been found to have positive correlation in many aspects of our lives.

#### GENERAL PRINCIPLES OF NON-VERBAL COMMUNICATION

Non-verbal communication is multi-channelled. This is to say that while verbal communication is limited to a single channel, namely, words, non-verbal communication will involve simultaneous transmissions through a number of modalities or sub-channels. The facial expression, for example, can be used at the same time as eye movements.

Non-verbal communication is relatively spontaneous. More often than not, messages sent through non-verbal channels are very spontaneous, while speech is very much under conscious control.

Non-verbal communication is relatively ambiguous. While there is generally some consensus about most of the words in speech (though there is some degree of ambiguity in some instances), there is no universality of meaning when it comes to non-verbal messages. These must therefore be interpreted with great care. It thus becomes important to be aware of the different meanings that different cultures and sub-cultures can attach to the same non-verbal signal.



Non-verbal communication is culture-bound. A good illustration of this is a common hand-shake. Different cultures shake hands differently. So, too, do men and women.

Non-verbal communication may contradict what is said. A person may say one thing but act in a fashion contradictory to what has been said. When one is confronted with such inconsistency, it is better to take what the non-verbal signals indicate because of their great spontaneity. Also, it is important to bear in mind that it is easy to lie verbally, but a lie is more readily detected in a non-verbal context.

#### KINESICS, THE LANGUAGE OF THE BODY

While various non-verbal messages can be sent using different body language signals, the face has been found to be the major source of non-verbal messages, according to Albert Mehrabian (1971).

#### **FACIAL KINESICS**

In both animals and humans, the face also transmits emotions, which can be easily interpreted by many to mean happiness, sadness, surprise or disgust, depending on the signals displayed. While there may be some cultural variations, some facial signals tend to be pretty similar across highly divergent cultures.

Take deceit for an example. These messages can be better transmitted with the face than with any other body part. Modulation and falsification are two common forms that facial deceit may take. Modulation in non-verbal communication is when you intentionally control your facial expression to emphasise or downplay an emotional feeling. Men, for example, are good at this (deduced from the saying "men don't cry"). Here a man will do all in his power to uphold the belief that men do not cry, however difficult or emotional the circumstances maybe. The implication is that crying is a response of women. Falsification on the other hand entails faking a feeling that is not actually being experienced. The intention is to mislead an observer about what is actually being experienced. However, facial deceit may be easily detected by contrasting what the face is saying to what the rest of the body is acting or doing, and by hesitating before the person mutters his deceptive non-verbal signs.

## **VISUAL KINESICS**

Another major means of non-verbal communication are the eyes. It is the duration of eye contact between people that is most meaningful. Various factors influence the amount of eye contact between people as in the following scenarios:

- When a person is listening intently (long stare).
- Under embarrassing circumstances (short, darting looks).
- Women look more as if to figure out something or to read as much from the situation as they can possibly get out of it.
- When lying (short, evasive looks).
- Again when the interaction is unpleasant (short, darting look) or when somebody is guilty or hiding something.

It is important to consider cross-cultural differences. In most African cultures, it is sign of respect not to look a person in a position of authority in the eye. Conversely, in Western cultures, this is considered as a sign of dishonesty or untruthfulness.



Eye contact is closely attuned to feelings of interpersonal communication. Consider the following situations:

- Friendly vs. unfriendly.
- Couples in love.
- As an indication of liking, usually accompanied with a smile.
- Flirting.
- A child making a plea to his mother "mother, p-l-e-a-s-e!" (notice the long confronting look allowing one no chance to refuse or to avoid the issue).

The woman manager needs to be aware of these different nuances and make sure that she does not send her subordinates and colleagues double messages. She also should be reasonably informed about cultural differences that exist among the people she manages, to refrain from sending offensive signals.

The woman manager should appreciate that different contexts call for different behaviour. Hence, circumstances might arise where she may need to use body language to assert herself and her authority.

Eye contact in transmitting messages that are unrelated to attraction:

- To induce feelings of anxiety in others expressing dominance.
- When you want to obligate someone to interact with you.
- When you want someone to comply with your request pleading.
- To indicate shock.
- To indicate disgust.

## **BODILY KINESICS**

- Relaxation when leaning back, open arms and legs.
- Showing interest leaning forward.
- Negative attitude angling their bodies away from you.
- Hand gestures for referencing and emphasis. When using hand gestures it is important that women managers be aware of the cross-cultural differences in interpretation.

## SOCIAL DISTANCE - THE DYNAMICS OF CLOSE ENCOUNTERS

Among animals, territoriality is the marking off and defending of certain areas against intrusion by other members of their own species. By contrast, personal space among humans refers to the space which they feel belongs to them, in relation to the people immediately around them. It is some "bubble" that people carry around them. The size of this bubble will differ from person to person, relating to cultural background, social status, family background, age, gender, etc. (Refer to the Harassment Module for possible cross-cultural differences in the manipulation of distance that can lead to misunderstandings).

#### **DISTANCE AND RELATIONSHIPS**

Social encounters determine distance. There is a small distance between people with similar social status as it is between those who like each other. A closer form of distance, namely, intimate distance, leads to the blurring of boundaries. There is also social distance, which, on average, maintains a comfortable distance of 4-12 feet apart from others. It is worth noting that interaction can still take place even within distances as far apart as 12 feet and beyond. This is to allow people space while affording them the option to either



respond or ignore the other person. At such wide distances, communication tends to be rather impersonal.

What one can deduce from all the talk about communication and distances is that the distance between people will be determined by the type of relationship they have with each other.

In cases where somebody's space is invaded, it is very difficult to predict what the reaction is likely to be, but invariably, it is always hostile, and can even amount to harassment.

### **IMPLICATIONS FOR WOMEN MANAGERS**

- Beware of cross-cultural differences that exist among different cultures. Africans, especially those from rural areas, tend to observe a very limited social distance. This can lead to feelings of discomfort to people coming from other cultural orientations.
- The issue of sexual harassment is very broadly defined as unwanted sexual advances.
  Hence, in maintaining social distance with colleagues and co-workers, be particularly
  attentive to behaviour like people holding back, pushing of chairs away from you, tilting
  backwards, squashed against the wall. This could be an indication that you are invading their personal space.
- Pay attention to your own personal habits and make sure that your own personal habits
  do not cause offense, like getting too close to people, and making no distinction
  between the social distance to be maintained with friends, acquaintances and
  strangers. If necessary, try to change such habits.

#### **PARALANGUAGE**

The emphasis on paralanguage is more on the way in which something is said rather than what is meant. In a sentence, for example, one can vary the meaning of the sentence by emphasising different words in that sentence. In some instances, the way the inflections are made can mean the direct opposite of what the verbal message can appear to mean, while sometimes, by playing with punctuation and different pitches of the voice, innuendo may be intended.

#### **FUNCTIONS OF NON-VERBAL COMMUNICATION**

Non-verbal signals may serve as substitutes for verbal expression. For example, in noisy surroundings, you may just use a sign language, or when somebody is at a distance and you cannot shout, just beckon to him. At times, a nod to indicate agreement or shaking your head to indicate disagreement will also do.

These symbols may also serve to accent concurrent verbal transmissions, as in emphasising what has already been expressed verbally, like:

- They may supplement the verbal transmission, for instance, while arguing ferociously verbally, but via eye contact, communicating that nevertheless we are still the best of friends.
- Non-verbal signals may regulate the flow of conversation, as in to indicate, for example, that I have finished speaking.
- Non-verbal signals may be used also, to communicate emotions for example, at the loss
  of a relative, we simply express our condolences by giving somebody a hug, while to congratulate somebody we also hug them, but in a different manner.



# UNIT 5:

## VERBAL COMMUNICATION

#### **OUTCOMES**

Having completed this unit, women managers should be able to:

- Identify barriers to effective communication.
- Know how to achieve effective communication.
- Understand elements of self-disclosure.

Verbal communication is often riddled with barriers that should be clearly understood before one can try to overcome them.

#### WHAT IS A COMMUNICATION BARRIER?

Heun & Heun (1975) define a communication barrier as anything that inhibits or blocks effective communication. In fact, they argue that more often than not, effective communication happens more by chance than as a norm. Among the most common barriers to communication are:

- Carelessness both on the part of the source and of the receiver of information. On the
  part of the source, it is very common to find people who will speak without any forethought, in which case, one finds people saying things that they do not really mean. On
  the part of the receiver, carelessness comes as a result of distraction, boredom or even
  inattentiveness.
- Motivational distortion occurs because as listeners, we have our own frame of reference and tend to see or hear what we desire to hear or see. We often listen selectively, hearing only what supports our beliefs.
- Self-preoccupation where a person, because they are too preoccupied with themselves, will go on and on talking about themselves to the disregard of other people.
   Such people have no time to listen to other people, and all they are concerned about is to show off to others and thereby showing off to themselves about themselves.
- Defensiveness when we do not want to be hurt either by judgmental people, domineering people, the know-it-all type or people who suffer from superiority complex. These will perpetually be reminding you of who and how important they are.

#### HABITS THAT CONSTITUTE BARRIERS TO EFFECTIVE COMMUNICATION

Managers compound listening problems by:

- · Not taking the sender of the message seriously.
- Second-guessing the sender.
- · Prematurely closing.
- Not listening as a status symbol.
- · Becoming distracted by the sender's habits and tactics.
- Prejudging the content of the message.
- Over-reacting to key words or phrases.
- Locking into their own viewpoints in an argument.
- · Listening for too much detail.
- Wasting the difference in time between thought and speech.
- Being defensive.



Communicating effectively is a function of receiving messages, interpreting these and then formulating an appropriate response, after having read the message and its context correctly. It is important to learn to become a better listener by correcting poor listening habits. Active listening is the first step towards effective communication.

### HOW TO ACHIEVE EFFECTIVE COMMUNICATION

Women managers can still do something by way of enhancing their communication processes. Generally, the following guidelines will contribute towards making women managers effective communicators:

- **Empathising** or being sensitive to other people's feelings is one way of showing respect and understanding for their situations. This might be one of the most positive things to do, because when people feel you appreciate and understand their situations, a positive climate for communication already prevails.
- It is important to learn to **withhold judgement** against people, lest they feel they are being put on the spot.
- Avoid hidden agendas people can easily sense these and then close up.
- **Promote equality** however important a person is, constantly reminding people of this is bound to have negative effects and might even breed contempt.
- Thoughts and opinions should be expressed with some **air of tentativeness**. Not only will this encourage people to come forward with their ideas, but also to realise the flexibility in you and thus come with possible solutions.

#### OTHER USEFUL GUIDELINES WHICH PERTAIN TO SPEECH

- Aim for specificity and concreteness this will help you achieve a lot within a short space
  of time. It avoids the danger that might end up not communicating anything if you were
  to ramble on and on vaguely.
- It is important to consider your listener's frame of reference, especially if you know his/her background, because you will be able to convey your message in the manner that he/she can understand.
- Avoid loaded words if the intention is to convey a certain message and not evoke other emotions and reactions not relevant for the occasion.
- The verbal and non-verbal messages must be congruent to each other, i.e. what you do
  must be consistent with what you say. Much as non-verbal communication is spontaneous, a great effort must be put into achieving consistency.

#### **SELF-DISCLOSURE**

Another important element of interpersonal communication is self-disclosure. Self-disclosure can be defined as an act of revealing private information about yourself to another person. It is a voluntary act of verbal communication. In general terms, self-disclosure involves opening up about yourself to others, and the assumption here is that there must be some element of trust before one can engage in such an act, because disclosing oneself means engaging in deep personal and meaningful communication and not just a perfunctory one.

Self-disclosure is an important element in our lives and a crucial factor in the development of friendship and more intimate relationships. Note that the appropriateness of self-disclosure depends on the degree of familiarity with the person to whom such disclosure is made. The intention is almost always to get closer. For this reason, women managers must be careful not to disclose themselves too much to subordinates.



### WHY DO PEOPLE ENGAGE IN SELF-DISCLOSURE?

There are a number of reasons why people engage in self-disclosure. The following are the most common:

- To help release some tension.
- To help clarify our feelings.
- For the sake of comparison in order to understand ourselves better.
- For building relationships, because if you hope to know other people, you must first disclose yourself.

### **EXERCISE**

Think of a time someone did not pay full attention to your message. Recall the situation and try to identify the non-verbal messages you were getting that indicated to you he or she wasn't really interested. Remember facial expression, eye contact and quick movements, glancing down at a watch. If you knew then what you know now, how would you have reacted?

### **EXERCISE**

Try to observe two or more people who are involved in a conversation. See if you can detect any non-verbal and verbal communication messages. What do the signals tell you about the communication process between the individuals concerned? Do you think both the sender and the receiver could get the full meaning of what was communicated?

### **EXERCISE**

This exercise should be done by a group of 4-6 people. It should be based on an incident or person that they all know or have been fairly exposed to. One hour should be allocated for the exercise. Think of a time when you found yourself in an argument with someone and do some self-analysis.

- Were you really listening to the other person's statements? What were you thinking about instead?
- If you had an opportunity to initiate a second discussion, would you react the same?
- · How should you have controlled your emotions?
- Would you have improved the situation by active listening?
- What results would you have obtained from this situation?

Make a list of words or phrases that you like and dislike and identify the reasons why. Who do you know who commonly uses them? How do you feel about these people's performances and capabilities? Are your feelings justified? Compare your notes with those of the rest of the group.



SECTION B: WRITTEN COMMUNICATION

### UNIT 6:

### WRITING AS A MEDIUM OF COMMUNICATION

### **OUTCOMES**

Having completed this unit, participants should:

- Understand the basics of business writing.
- Appreciate the importance of the readability of written correspondence.
- Be aware of barriers to effective written communication and avoid them.

### WHY IS WRITING IMPORTANT?

As a manager, particularly a woman manager, you need to be able to understand why you are using the written medium. You would use a written medium:

- When you need a written record.
- Anything to do with money, safety, or equal opportunity, or anything of substance you have agreed to do or expect someone else to do.
- When you need to inform several people at once and oral feedback is not required, a short memorandum copied to several recipients is a great time saver.
- When a piece of information should be permanent and easily retrievable, pulling a letter out of a file is easier than retrieving information from a tape or other electronic devices.
- When the message is complex. It is more difficult to absorb complicated ideas or data by ear. In a written form, they can be re-read and studied.

# WHY SHOULD YOUR TARGET AUDIENCE BE INTERESTED IN READING WHAT YOU HAVE WRITTEN?

Once you have decided that a certain communication should be written, and you know the point you want to make, you should ask the following questions before you decide to write:

- What is this about? (the main point).
- Why should my reader be interested? (the "so-what").
- What should my reader do about this? (the goal or purpose).

#### P HINTS

Your written correspondence should be circulated only if the above questions have been answered convincingly.

### WHAT ABOUT THE READABILITY OF WHAT IS WRITTEN?

Your writing may answer all three of the above questions and still not be readable. One of the worst enemies of readable writing is what is called 'organisational style'. This style, common among managers and executives, aims for dignity and importance, but in most cases, it succeeds only in being pretentious and unintelligible. Its hallmarks are a vocabulary of big, abstract words, an overabundance of words, and dully, impersonal sentences, mainly in the passive voice.



The obvious antidote for a woman manager is to write simply and naturally. Good writing is not speech literally transcribed. Good writing sounds like a good speaker would sound if she were perfectly fluent and controlled. The best way for women managers to do this is to learn to revise their own writing and keep it simple.

### **EXERCISE**

Do you have an internal communication policy in your department? If so, does it provide adequate guidelines on how, when, where and why information should be disseminated to all levels of staff? Indicate areas for improvement in your policy.

### BARRIERS TO EFFECTIVE WRITTEN COMMUNICATION INCLUDE:

- Excessively long chains of commands.
- · Information overload.
- Inappropriate message construction.
- Lack of concentration on the part of the transmitter or on the part of the recipient of the message.
- Lack of comprehension of what is written.
- · Restricted channels of communication.
- Selection of an inappropriate medium of communication.
- Inability to encode and decode, especially in communication through the medium of a second or third language. This constitutes a language barrier.

The **medium** of communication used, as in a letter or a memorandum, etc. is the link between transmitter and receiver. Both need to "tune-in" to the medium. Managers must therefore select a medium suited to the needs of the transmitter. Successful communication results in recipients **understanding** messages that h require recipients to interpret the words, body language (where appropriate), hints and implications contained in the messages sent.

### **SELF TEST**

Identify three barriers to effective communication in your unit/department. How can you overcome these?



### **UNIT 7:**

# EXPLAINING THE VARIOUS TYPES OF WRITTEN COMMUNICATION

### **OUTCOMES**

Having completed this unit, the participants should be able to:

- Distinguish between the various written communication media.
- Identify the purpose for which each medium is used.
- Understand the role of written media.

### WHAT IS BUSINESS WRITING?

Business writing is one of the activities that fit into the category of technical writing. Technical writing includes business reports, letters, scientific papers, instruction manuals and other kinds of writing at work. Business writing encompasses similar categories, but puts less emphasis on scientific papers.

Business writing is characterised by being:

- Concise
- Direct
- Informative

It may serve either to inform, persuade, teach or any combination of these intentions.

### **EXAMPLE:**

- 1. An advertisement that may serve only to persuade.
- 2. A proposal serving the purposes of both being informative and persuasive.

Can you think of any other examples of business writing? Where would you use business writing in your respective area of work and for what purpose?

There are several types of written communication that women managers in education can use:

- Mandates
- Letters
- Memoranda
- Reports
- Proposals
- Progress reports
- · Research reports
- · Feasibility reports

### WRITING A MANDATE/INSTRUCTION/CIRCULAR

When writing mandates/instructions, the manager has to describe, explain and specify qualities or requirements. In this type of writing, the manager normally does not have to evaluate, justify, persuade or recommend (as she would in some other forms of written communication, for instance, reports).



It is essential that the subordinate understands the manager's expectations. Clarity of exposition and logical ordering of material are vital to the implementation of instructions. Subordinates usually use established procedure documents for the execution of an instruction.

It is important for the manager to ask herself the following questions to assist her in formulating a mandate, making it an effective communication tool:

- · Who will use the information?
- How informed is the reader on the subject?
- What do I want the reader to be able to do, i.e. what is the expected feedback?

Women managers should be guided by the following rules when formulating written mandates:

- Arrange the mandates in the exact order in which operations should be completed.
- Write each mandate in the simplest language possible.
- Be comprehensive. Ensure that all necessary steps are included. Do not assume that the readers will be able to fill in missing sections. Spell out every detail that could cause doubt.
- Write in the imperative (as in this list), in the first person, avoiding abbreviations, and using complete sentences rather than note form.
- Set out the information in the form of a list, with each instruction clearly labelled. Key words may be typed in capital letters.
- Avoid ambiguous words, or words with double meaning, as well as unfamiliar words.
- At the end of the list of the instructions, insert a checklist of things to look for if the operation goes wrong. A brief summary of the major steps might also be useful.

Finally, get someone who has not worked through the mandate to work through it without help from anyone. Try this a number of times, revising the instructions in light of what goes wrong.

### **EXERCISE**

Using the guidelines on writing mandates/instruction given above, develop your own set of rules and use them to generate a mandate to your subordinates.

### **WRITING A LETTER**

Managers should avoid creating two categories of letters, namely those regarded as 'important' which in consequence are considered carefully and those regarded as 'routine,' which are drafted just once without much thought and which, stylistically, leave much to be desired. Women managers should note that this practice negatively affects the subordinate's view of their competency.

To improve the quality of 'routine' letters, the woman manager should adopt the following practices:

- Start by jotting down the points she wishes to make.
- Think of the reader. How does she want and expect the reader to react to the letter?
- Arrange her list of points into a new and more logical order (the impression she creates will depend on the organisation of the letter).
- Have a subject heading at the top and be straight to the point of writing the letter in the first paragraph.



- **SELF MANAGEMENT**
- When replying to a letter from someone else begin with the words 'Thank you for your letter of (date) ... concerning (details of subject), followed by further information on the matters discussed.
- If she is initiating correspondence, she should state at the outset the information she needs to transmit or requires from the other party.
- The following four sections are then required:
  - Information and actions that need to follow.
  - Supporting details, evidence and views.
  - A summary, stating conclusions and the actions that need to follow.
  - The closure, thanking the reader for his or her attention and looking forward to a reply.
- If there are enclosures to accompany the letter, the woman manager must list them after her signature.
- Aim for a simple and direct style.
- Be as clear and concise as possible.
- Avoid pompous phrases or anything hinting at intimidation.
- The need to connect with the reader and elicit in that person an empathetic response.
- · Unlike spoken words with gestures, facial expressions and body movement, when writing a letter she only has the tone of the words to indicate her ambitions and state of mind. It is thus important that she chooses her words carefully and check constantly to ensure they will not cause offense.
- Write in the first person and keep the letter brief.
- If a letter is more than two pages long, it is better to rewrite it as a report, accompanied by a short covering letter.

Analyse a selection of business letters that you have written recently and cast a critical eye over them. Can you identify any faults in your style or layout? Re-write one of those letters following the recommendations made above. If you have never written a business letter before, identify a topic or issue that you would like to address and draft a letter, following the rules.

### **MEMORANDA**

- · Managers use memoranda instead of letters for internal communication. Memoranda are usually shorter and more direct than letters.
- There is no need for a salutation ("dear sir") at the start or "yours faithfully" at the end.
- Memoranda should be structured according to the same practices as letters.
- Avoid long sentences, use plenty of headings and sub-headings and number the points so that recipients can refer to relevant details in their replies.
- Memoranda are better than telephone conversations in that they provide a permanent record of the communication.
- Memoranda should always be signed, or at least initialled.



The perception about memos that often leads to a disadvantage is that memos tend to:

- 1. Be circulated in numbers leads to perception that they are routine.
- 2. Have a marginal interest in the context.

### **EXERCISE**

Distinguish between a business letter and a memorandum.

#### **REPORTS**

A report is a manager's means to make or give a formal account of business-related events. There are many different types of reports, depending on what they purport to report on, namely:

- · Progress reports
- Research reports
- · Feasibility reports
- Audit reports
- · Interim reports

### REPORTS CAN BE CLASSIFIED INTO THREE MAJOR CATEGORIES.

· Information reports

These give factual information about a given situation, such as progress reports.

Analytical reports

These reports are analytical and tend to be technical in nature. They interpret data but do not recommend action. An example would be audit reports.

Recommendation reports

These reports recommend an action or solution to be taken, such as feasibility reports.

All reports should contain statements of their terms of reference and brief summaries of major conclusions. All report writing involves the following tasks/steps:

Collection of material

Obtaining information, conducting research, checking the accuracy of facts, distinguishing facts from opinions.

· Selection of material

Isolating important material, deciding which facts to use in support of arguments.

· Ordering sections

Classifying material, placing sections in a logical order and deciding on headings and sub-headings.

· Writing reports

Choosing a style appropriate to the audience for which the report is intended. This will determine the choice of illustrations, tables, graphs, and diagrams.

Presentation

There is no single correct way in which to structure a report.

### PRESENTING YOUR REPORT

Here is one possible layout:

Title page



- Executive summary
- Table of contents
- Introduction
- Text of main body of the report
- Conclusions
- Recommendations
- Appendices containing tables, technical calculations or references

### LAYOUT OF YOUR REPORT

The first thing that writers need to consider is "for whom" is the report intended and what is it meant to achieve. The style of a report should aim to inform rather than impress. It should be clear, concise and comprehensive. Here are some guidelines for writing reports.

### **TITLE PAGE**

Put the title (which should fully describe the contents of the report), together with your name, departmental address, and date of submission and circulation list on a separate covering page.

#### **SUMMARY**

Begin the report with a one or two paragraph summary of its major findings. For long reports, have a contents page with page references to sections. The summary contains a statement of purpose and the scope of the report, as in why is the report written, what is its purpose and what area/scope does it cover.

### INTRODUCTION

Start the introduction with a clear statement of why the report is necessary and its terms of reference. Outline previous investigations undertaken on the same subject, then take the objectives of the present report. Your reports should begin with a precise definition of its contents, sufficiently detailed to inform readers as to whether or not the information is relevant to their particular needs.

#### **BODY**

In writing the body of the report, put yourself in the position of the eventual reader, asking what he or she needs to know, what sort of illustrations, examples and supplementary data will help him/her understand the discussion and what background knowledge the reader already possesses.

Keep within the terms of reference. Check the relevance of each paragraph against your central thesis and arrange the material in order of importance from the reader's point of view. State the fundamental points first and the detail later. Readers find assimilation of detail easier if they have been given a general framework into which it can be fitted.

Of all management reports, those about people are the most difficult to prepare, since there are special problems involved in expressing opinions on subordinates' personal characteristics in clear, precise terms. Use titles rather than names, unless the subject being communicated warrants it



### **PROPOSALS**

The function of a proposal is to gain approval. It is a report that describes the idea, says why it is a good idea, and says why the writer or the writer's company should pursue it. It sketches the work to be done, sets a schedule and estimates costs. It urges action, that is, it tells the reader to get the lead out and approve the idea.

The proposal writer may also be responding to a "request/call for proposals" to investigate a question/issue. In such a case, the idea is not yours, but you are still seeking approval for a project. You will urge action - a decision in your favour or against on the basis of cost, schedule, thoroughness and past performance.

Clearly, the manager will use a proposal to sell an idea or a product. The voice of the proposal is thus persuasive and its "mode of discourse" is argumentation. Managers should note that proposals follow on a basic plan namely:

- State subject and purpose.
- Define the problem, say why a solution is necessary.
- · Describe what the project will entail.
- · Say what methods will be used.
- Break your project down into sub-projects and sub-tasks, and tie each to a deadline.
- Say what facilities you have access to.
- Briefly describe the personnel who will work on the project and say what their qualifications are.
- Mention previous successes and give reference for confirmation.
- Indicate the likelihood of the project reaching a successful conclusion.
- Say what the project's final product will be. Will it be a report, a pilot plant or computer programme?
- Spell out projected costs, and methods and timing of payment.
- Urge action.

As a manager, any proposal you write should be neat in appearance and give the impression of careful, complete workmanship.



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# ARRANGEMENT OF THE TRAINING MODULES WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS

The training materials for Women in and into Management and Leadership Positions consist of eleven (11) modules.

The eleven (11) modules in turn are grouped into four (4) major themes derived from the needs assessment conducted at the beginning of the material development process.

### THE THEMES AND THEIR RELATED MODULES ARE:

### Theme one: Personal Attributes

Module 1: Assertiveness Training

Module 2: Recruitment and Selection: Tools to assist women managers perform better as

interviewers and interviewees.

Module3: Self-management: Empowering Women Managers to manage themselves

effectively.

Module 4 Harassment: How to effectively deal with harassment at work.

### Theme two: Strategic Leadership

Module 5: Women in and into Management and Leadership Positions and the Law.

Module 6: Strategic Planning and Leadership for Women Managers in Education.

### Theme three: Managerial Modules

Module 7: Diversity Management for Women Managers and Leaders.

Module 8: Managing resources for women leaders in education.

Module 9: Effective communication.

Module 10: Group and Team dynamics: Women managers building effective teams.

### Theme four: Administrative Modules

Module 11: Written Communication

Module 12: Conducting Productive Meetings



### PREFACE: GROUP AND TEAM DYNAMICS

This module is targeted at women managers as well as those women who are aspiring to management positions in education. The objective of the module is to enable women managers to build effective and productive teams so as to accomplish the objectives of the Department as stipulated in its policies and strategies. As a woman manager or executive, she will be expected to perform various functions that require core skills. Such core skills can range from problem solving to staff motivation, etc.

Team building is certainly a key skill to have for almost anyone within the Department. It is important to keep in mind that in your work environment, you will encounter people of all sorts. Some you will get on with. With others you will not. Some will help you, inform you, or teach you. Others will infuriate you. Be mindful though, that male or female, young or old, senior or junior, all will require you, as a manager, to have a good understanding of people and how to relate to them, both as individuals and as work teams. Your ability to build, manage and lead teams is important in order to accomplish harmonious, productive working relationships.

There are seven units in this module. The module deals first with general "people matters", then with issues most appropriate for managing others, and lastly, matters relating to people working together on a task. The intention here is to give you a feel of a whole range of "people, management and leadership issues" that affect groups and/or teams, either, positively or negatively.



**SELF MANAGEMENT** 

### **EXPLANATORY NOTES:**

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FACILITATOR'S INPUT/NOTES

This icon indicates sections in the manual where the facilitator is required to refer to the guide for detail.



**HINTS** 

This icon gives hints/tips about how you can handle the leadership management issues under discussion in the unit.



**ROLE-PLAY** 

This icon refers to an activity that should be done by a group of people (more than one person). In this activity the group is divided so that the participants play different roles and others observe and provide feedback to those who par-



**EXERCISE** 

This icon refers to an activity that should be done individually or with others. The exercise is aimed at assisting the participants to apply the acquired

ticipated actively in the exercise.





**CASE STUDY** 

This icon refers to an activity that depicts a real life situation. The participants are expected to do the case study as individuals or groups. It is designed to allow the individual to apply both personal experiences and information provided in the unit or

module to come with a solution.



**SELF-TEST** 

This icon refers to an activity that should be done on an individual basis. The answers to these activities are found in the contents of the unit/module.

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### **INTRODUCTION**

The results achieved in a work environment are seldom the outcome of a single individual's efforts. Work at different levels in the field of education involves co-operation among all involved. This applies to the classroom as much as to the highest office determining strategy for the education enterprise. The spirit of co-operative governance that the Department of Education is striving to promote requires that managers involve all the relevant stakeholders in addition to the statutory committees they are required to establish. It is therefore imperative to maintain effective teams. This module seeks to guide women managers in using this natural ability to connect by constituting and maintaining high performance teams.

### **ASSUMPTIONS**

- Education is not a solitary activity and as such, it requires that the efforts of all involved be harnessed in collaboration.
- Success in the management of education depends largely on how a manager is able to build highly effective teams at all levels, i.e. from study groups to think-tanks dealing with specific issues.
- Building effective teams is something that requires thoughtfulness.
- The success of teams depends also on the leadership styles of team leaders.
- A team's development is cyclical, and team outputs depend on the stage at which the team is operating.
- Team leaders need to be aware of group dynamics and realise their potential to paralyse the team.

### **BROAD AIMS OF THE MODULE**

The broad aims of the module are to enhance the participants' understanding of:

- The differences between groups and teams.
- How to build high-performance teams.
- Barriers associated with groups and teams.



### **UNIT 1:**

### UNDERSTANDING GROUPS

Any group of individuals working towards the same goal must co-operate with each other in order to achieve success. Any group activity should be premised on the notion that the individual is insufficient in relation to the expected output. The strength lies in members complementing each other in a manner that leads to the achievement of group goals.

### **OUTCOMES**

Having completed this unit, participants should be able to:

- Apply the theoretical knowledge they gain about group size in group activities.
- · Appreciate how groups develop.
- Appreciate the roles played in groups and apply this knowledge in constituting high-functioning teams.

### WHAT IS A GROUP?

A group can be thought of as two or more persons who are interacting with one another in such a manner that each influences and is influenced by each other." (Shaw, 1981) Without mutual influence, you are a free rider.

Given this definition, list the groups that you are involved in and indicate how the groups influence you and vice versa.

GROUP	HOW YOU INFLUENCE	HOW INFLUENCED

### ISSUES RELATING TO GROUP SIZE

Before you constitute any group, be aware of the advantages and disadvantages brought about by group size.

Advantages of a large group:

- Different skills.
- Different values.
- Different perceptions.
- More people power.
- Social facilitator increased output due to increased number of people as well as individual accountability.



### **DISADVANTAGES:**

- Formation of cliques.
- Longer delivery times if they all participate in the same task.
- Reaching consensus in not always easy
- Social loafing which results from a lack of individual accountability.
- Process loss which results from reduced output as the group size increases.

### **HOW GROUPS DEVELOP**

Women managers in education need to be aware of the fact that groups go through developmental stages, which are:

STAGES	CHARACTERISED BY
1. Forming	<ul> <li>Polite conversations</li> <li>Low trust</li> <li>Gathering of superficial information about other members</li> <li>Rejection of emerging leaders with negative characteristics</li> </ul>
2. Storming	<ul> <li>Inter-group conflicts</li> <li>Heightened emotional levels</li> <li>Status differentiation</li> <li>Building of alliances</li> </ul>
3. Norming	<ul><li>Emergence of a leader</li><li>Development of group norms</li><li>Group cohesion</li></ul>
4. Performing	<ul> <li>Group members play functional interdependent roles</li> <li>Focus on performing group tasks</li> </ul>

The understanding of the various stages in group development has the following implications for women managers in education:

- It is important that managers allow groups time and space to consolidate.
- The woman manager should align her expectations of group output with the development stage at which the group is.

Considering your interpersonal skills and maturity as a manager, if you were to put together a group to perform a particular task, would you prefer a big /small group? What do you think would be the motive behind your preference? After exposure to this unit, would you change your preference and why?



### **GROUP ROLES**

There are two fundamental positive roles played by a manager or leader in a group. These are: task role (getting the task done) and the relationship role (supporting and relationship role with a group). These roles are aimed at contributing to the group's overall effectiveness. Team leaders should guard against several types of dysfunctional roles which may occur with group roles and can impede group performance.

Task, relationship and dysfunctional roles of groups.

ROLE	RESPONSIBILITY
Task Role (+)	Initiating Defining the problem Suggesting activities Assigning tasks
	Information seeking Asking questions Seeking relevant data and views
	Summarising Reviewing and integrating other points Check for common understanding and readiness for action
	Evaluating Assessing validity of assumptions Assessing quality of information Assessing reasonableness of recommendations
	Guiding Keep group on track
Relationship role (+)	Harmonising Resolving interpersonal conflict
	Encouraging Supporting and praising Showing appreciation for contributions
	Gate keeping Assuring even participation by all members Eliminating domination of members
Dysfunctional role (-)	Dominating Monopolising group time Forcing views on others
	Blocking Stubbornly obstructing and impeding group work Persistent negativism
	Attacking/ Vilifying Belittling others Creating a hostile or intimidating environment
	Distracting Engaging in irrelevant actions Distracting other's attention Withdrawal/ Passive

Women managers must be aware of those roles that are destructive to the group and seek to discourage them by all means, while encouraging those that enhance group performance. All managers should aim at having higher levels of group cohesion.

### TIPS IN MAXIMISING THE PERFORMANCE OF GROUPS

- Encourage group members to take on the role of critical evaluator. Emphasise the importance of airing doubts and objections.
- Create a climate of open inquiry through being impartial and objective.
- Avoid stating personal preferences or expectations, which may influence group objectives.
- Establish independent groups to make recommendations on the same issue.
- Assign at least one member of the group to play devil's advocate. This role should be rotated from meeting to meeting.
- Set clear outcomes



### **UNIT 2:**

### **TEAMS**

### **OUTCOMES**

At the end of this unit, participants should be able to:

- Differentiate between groups and teams.
- · Appreciate how teams develop.
- Apply principles relating to teaming up for the benefit of productivity.

### **DEFINITION OF TEAMS**

A team is any number of people who are working together towards a common purpose. Within the context of the common purpose, there is within teams a clear definition of roles and responsibilities. The overall success of the team depends on every team member pulling their weight.

### **CHARACTERISTICS OF TEAMS**

Teams are characterised by:

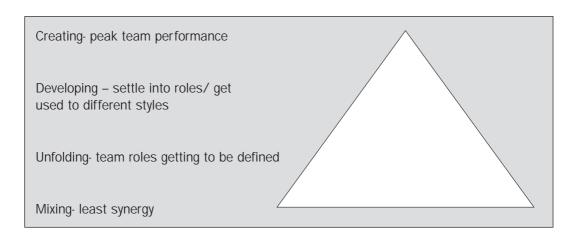
- Mutual interaction.
- Reciprocal influence.
- Stronger need for identification.
- Common goals and tasks.
- Greater task inter-dependence.
- · More differentiated and specialised roles.
- · Shared understanding of roles and responsibilities.

In short, teams are highly specialised groups, and like groups, they go through developmental stages.

### DEVELOPMENT STAGES IN THE LIFE-CYCLE OF TEAMS

STAGE	1. MIXING	2. UNFOLDING	3. DEVELOPING	4. CREATING
Barriers / characteristics	Anxiety Expectations Mistrust Rejection Labelling	Aligning Gelling Befriending Accepting	Opening up Challenging Sharing Disagreeing Trusting	Focussing Criticising Empowering Rejecting Commitment Bonding





Women managers must align their expectations of team outputs with the developmental stage of the team. To get a good product, the life-span of a team should allow the team to go through the different stages.

### **ENHANCING TEAM PERFORMANCE**

Enhance the performance of teams by ensuring that all the basics are in place. The following are important considerations:

- Set clear objectives and define outcomes, and link these to performance standards.
- Allocate resources that the team needs to deliver, e.g. secretarial services.
- Allocate roles and responsibilities to team members.
- Assess technical skills.
- Provide the team with space and time to do its work.
- Allow for effective, open two-way communication.
- Minimise inter-personal conflict by dealing with it as soon as it occurs.
- Define the task in a clear and unambiguous manner.
- Each member should have a meaningful piece of work, sufficient autonomy to perform it, and access to knowledge of its results.
- Rules under which the team should operate must be defined in advance.
- Empower employees to provide assistance and to handle tasks on their own, where appropriate.
- Provide time and space for a trial run ahead of the due date.

Considering what you have learned about teams, think about teams that you are part of. Evaluate them in the context of what worked and what did not work and the possible reasons associated with your assessment.



### **IDENTIFY THE TEAM**

CHARACTERISTIC	WHAT HAPPENED	HOW TO IMPROVE
Team objectives		
Access to resources		
Technical skills		
Understanding operating rules		
Clear definition of tasks		
Communication		



### **UNIT 3:**

### **TEAM FUNCTIONS**

Teams are necessary because of the opportunity they offer members to complement each other's skills. Women managers in education are expected to exploit the strengths of people that they work with, regardless of their level of appointment.

### **OUTCOMES**

Having completed this unit, the woman leader is expected to be able:

- To constitute effective and balanced teams.
- To differentiate between functional roles and team roles.

### **FUNCTIONAL ROLES VERSUS TEAM ROLES**

- Functional roles:
  - Different members play roles in an education establishment based on rank and seniority.
- · Team roles:

Are adopted in terms of individual contribution and relationships with the rest of the team; whenever people work as part of a collective.

Look at the table below and circle those team roles and characteristics that describe you.

TYPE OF TEAM	CHARACTERISTICS	
ROLE	POSITIVES	ALLOWABLE WEAKNESSES
Plan/idea person	<ul> <li>Genius.</li> <li>Imagination.</li> <li>Intellect.</li> <li>Knowledge.</li> <li>Solve difficult problems.</li> <li>Serious-minded.</li> </ul>	<ul> <li>Up in the clouds</li> <li>Inclined to disregard practical details or protocol</li> <li>Individualistic</li> <li>Unorthodox</li> </ul>
Resource investigator	A capacity for contacting useful people and exploring new opportunities.  • An ability to respond to challenges.  • Communicative.  • Enthusiastic.  • Curious.  • Calm	<ul> <li>Liable to lose interest once the initial fascination has passed</li> <li>Can be over-optimistic and uncritical</li> </ul>



TYPE OF TEAM	CHARACTERISTICS	
ROLE	POSITIVES	ALLOWABLE WEAKNESSES
Co-ordinator	Self-confident	Not of exceptional intellect or creative ability
Shaper	Out-going	<ul> <li>Highly strung</li> <li>Prone to provocation irritation and impatience</li> <li>A tendency to hurt people's feelings</li> </ul>
Monitor evaluator	Sober	<ul> <li>Lack of enthusiasm or the ability to motivate other people</li> <li>Can be uninspiring and uninspired</li> <li>Can be aloof</li> </ul>
Team worker	Sensitive     Socially orientated     Rather mild     Ability to respond to people and situations and promote team spirit     A good diplomat	<ul> <li>Indecisive in moments of crisis</li> <li>They are adaptors rather than changers</li> </ul>
Implementor	Dutiful     Conservative     Predictable     Organising ability     Practical common sense     Hard-working     Self-discipline	<ul> <li>Lack of flexibility</li> <li>Slow to respond to new ideas</li> <li>Resistant to change</li> </ul>
Completer	A capability to delivery what they promise     Perfectionism     Orderly     Conscientious     Anxious	<ul><li>Inclined to worry unduly</li><li>Reluctant to delegate</li><li>Can be a nit-picker</li></ul>
Specialist	<ul><li>Dedicated</li><li>Provides knowledge in rare supply</li><li>Self starting</li></ul>	<ul> <li>Single-minded</li> <li>Contributes only on a narrow front</li> <li>Tends not to see the big picture</li> </ul>

In constituting teams, the woman manager more often than not, has to work with what she has rather than having the liberty to constitute an ideal team. As such she should be conversant with factors that influence success in teams, such that she can intervene constructively, if she observes the opposite.

### **FACTORS THAT INFLUENCE TEAM SUCCESS**

- Enough expertise among members to deal with the brief.
- Seek balance in terms of race and gender for the findings of the team to be deemed acceptable and politically correct.
- Insist on members staying on from beginning to end for the sake of continuity.
- Balance between experience and innovation.



### **UNIT 4:**

### **KEEPING TEAMS MOTIVATED**

You have identified the correct combination of people in relation to the task, or at least, the best you can afford with the available resources. Now you need your team members to want to work and succeed.

### **OUTCOMES**

Having completed the unit, the participants should be able to:

- Apply the principles of motivation to both individuals and teams.
- Choose/select appropriate reward types.
- · Keep teams motivated in difficult situations.

### TWO MAIN TYPES OF MOTIVATION

The two main types of motivation are internal motivation (intrinsic motivation), coming from within the individual, and external (extrinsic) motivation, coming from factors outside the individual. People who are internally motivated do not need any external rewards to be motivated to work. In reality there are very few people who are internally motivated. Hence, the need for managers and women managers to provide external rewards.

Within the broad categories of internal/external motivation, finer nuances can be found, i.e.

**SHORT-TERM**: This is for tasks that are of a short duration.

- **Internal**: where one is self-motivated for a short-term goal, e.g. an educator who is prepared to offer extra hours of lessons in preparation for exams with no overtime pay.
- **External:** here the short term activity is embarked on in order to achieve external rewards, e.g. overtime pay.

**LONG-TERM:** Here the objective is for team members to stay focused on the task that has a long turn-around time and to give their best consistently through all the various stages of the project.

- **Internal**: self-discipline propels one to engage in a long-term goal, e.g. improvement of one's qualifications to become better in what one is doing.
- **External**: when the long-term goal is pursued primarily for tangible external rewards, e.g. getting a promotion.

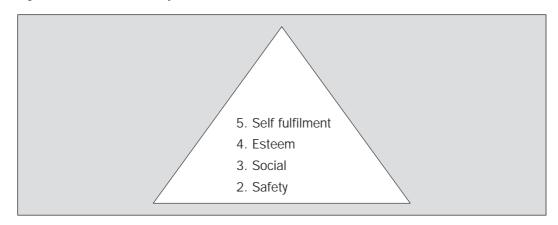
### **EXAMPLE**

People are motivated once they feel that it is worthwhile doing something because of the satisfaction it will generate. In your teams, make sure that all contributing team members reap the benefits of a job well done. In a task team looking at improving the guidance services at a school, it would be futile to including a non-educator who has no interest in the matter. That individual will de-motivate the team, because the task will not provide any personal benefit for the individual who has no interest in the subject matter.



### MASLOW'S HIERARCHY VERSUS TEAM MOTIVATION

Figure: Maslow's hierarchy of needs



### **EXPLANATION OF MASLOW'S HIERARCHY OF NEEDS**

The hierarchy of Maslow 's needs moves from the lowest/most basic need to the highest, i.e. that which never reaches a state of being completed. The highest need is what motivates people to engage in continuous improvement. Maslow 's hierarchy of needs is based on the assumption that lower level needs must be satisfied first, before people begin to aspire for higher level needs. For example, a woman manager with self doubt and poor self esteem will not be able to progress to a level of self fulfilment because of being preoccupied with issues of her own self worth.

**Physiological needs** relate to the basic need for food and shelter. Among educators, this basic need goes unmet if newly appointed educators spend a long period of time without salaries. Obviously, if their own needs are unmet, they cannot give their best to the learners. Safety needs refer to both psychological safety and physical safety. Employees who work under constant threats have their sense of psychological safety compromised. For example, in schools plagued by gangsterism and violence, the safety of both the learners and educators is compromised. As such, both learners and educators are prevented by the lack of security from giving their best.

**Social needs** refer to the inherent human need to affiliate. At the most basic level, human beings are social animals and as such they need to associate and interact with fellow human beings. Teams that get along well and where members feel worthwhile and welcome also satisfy this need in addition to fulfilling the task at hand.

**Esteem needs** have to do with the individual feeling worthwhile and accepted and that they are valuable members of the team. Women managers need to be able to protect team members from bullies because team members who are not made to feel that their contribution is worthwhile may experience the team as dis-empowering.

**Self- fulfilment** is experienced by individuals who are able to work extremely hard for the sake of feeling good about the contribution they are making. Under such circumstances, there is no need for external recognition. This level represents the highest level where there is no state of completion. This is what keeps people going beyond tangible rewards.



To keep team members sufficiently motivated, the task at hand should satisfy some need for its members. Otherwise, social loafing creeps in, at which people invest very little effort in the task at hand.

### SHORT-TERM MOTIVATORS

These are by their nature low-level, linking mainly with Maslow's lower-level physiological, safety, social and security needs:

- · Free lunch.
- · Being able to go home early.
- · Avoiding a task they don't enjoy.
- Claiming for subsistence and travelling.

Should the lower level needs exist, the woman manager needs to be aware of them and the reasons thereof. Furthermore, where the reasons for existence of such needs are linked to the education system, such causes will need to be eliminated. In cases where the reasons have nothing to do with the education system, the subordinates exhibiting such needs should be encouraged to resolve their problems.

### LONG-TERM MOTIVATORS

- Completion of tasks they enjoy.
- Prospect of appreciation to be received by doing the task well.
- · Wanting to retain a reputation for always delivering a good product on time.
- · Job satisfaction.
- Continuous support leading to personal development

### THE ROLE OF THE LEADER

### Handling mistakes:

Ensure that people are assigned to the right task and are working in the right environment.

### Stick to your word:

As a leader, it is important that your team knows that they can count on what you say. You need to be reliable and consistent. This enables your team members to trust you and it also improves your credibility with them. It is quite de-motivating to be told one thing by someone whose actions suggest something quite different. This is confusing at worst, and it leads to a breakdown of trust.

### **EXAMPLE**

Your comments about a piece of work submitted to you are: 'This report is excellent, thank you'. Subsequently, you review the work and add in corrections all over it. Would you do that if it was truly excellent? Or, if it is not, why say it is?

### Be positive:

Focus on the plusses, not the minuses. Also be honest about the negatives. Your role is to facilitate the team activities in the right direction, and any failure to deal with the negatives can lead to failure to reach the team objectives. Also be honest about the negatives.



### **EXAMPLE**

You are going through a piece of work with a team member and it is not up to scratch.

- **Negative approach:** "Well, it could be worse, but we'd better talk about several things here that need improving."
- Positive approach: "Here is some good work here. You set about this in exactly the right
  way, and gave yourself a clear structure to work to. After that, one or two aspects of the
  project got rather confused. If we could go through them we can work out what happened
  so that you don't have problems next time."

#### Strive for team cohesion:

- Focus the team on the objectives and try to mediate between warring factions.
- If the team likes you, that is a bonus. You must guard against striving to be liked to the
  detriment of the principles of fairness, honesty, respect and, more importantly, getting the
  job done.
- Guard against sacrificing productivity in favour of being liked.

### Be polite:

- Do not tell your team what to do ask them to do it.
- The magical words as a team leader are "thank you" and "please".
- If you ask someone to do something that is not their job, make it clear that you know it is not their job.

### **EXAMPLE**

"Robin, I know you are busy, but Kim is not here today, so could you please report back on her behalf so that the team knows where things stand at the moment and move forward?"

### Be generous:

Generosity could be related to giving everybody a fair chance and being flexible, as long as that generosity does not negatively affect productivity. This relates also to generosity with compliments where these are due.

Create an environment conducive to work. You need to create the right environment in order for people to be motivated. The physical environment has direct influences on productivity. If people work in a less attractive, dirty environment they are less productive than those in an attractive, clean, fresh environment.

### Avoid habits and behaviours that undermine teamwork:

- Do not practice favouritism/unfairness.
- Avoid excessive praise do not offer praise unnecessarily.
- Avoid making some team members feel that their opinions do not matter.
- · Avoid treating team members on the basis of professional status/hierarchy.
- Do not praise individuals where team effort was involved because you will be implying that
  individual performance was more important than the overall team performance, which
  might be construed as favouritism. However, recognise individual contributions that represent going beyond the call of duty.



### MOTIVATING A TEAM UNDER TRYING CONDITIONS

In motivating a team that is not always based in the same location, e.g. Provincial Co-ordinators, it is difficult to build and maintain team spirit. Regional co-ordinators, for example, are spread around the country. Here are some useful points on how to keep them motivated.

- Schedule monthly or quarterly meetings and ensure that they all get the roster and the names of the team members who will be attending.
- Make sure you keep them informed of progress on the project and that they keep the project manager informed via e-mails or fax.
- Encourage direct contact among members of the project team on project related matters. This encourages team contact with each other and mutual respect for each other's expertise. Compile a team newsletter so as to improve informal communication.
- Schedule team activities such as review sessions and monthly/quarterly meetings, and stick to the schedule.

## STEERING THE TEAM BY TAKING CHARGE, ESPECIALLY WHEN THINGS GO WRONG

Even with best the team, things can go off track and the team can be misguided. That is when the team leader has to take stock and use the prerogative of being chairperson and steer the ship in the right direction. You may find the following steps useful:

- Outline the basic intention, ask the team to give you their views, listen to them, and let them know you are listening.
- Demonstrate that you can see that they have a case.
- Let them know that you are listening by referring to points they have made.
- Offer a compromise if necessary, i.e. meet them halfway.
- Give them a good concrete reason why your decision is more effective (avoid value-judgements like "better").

### MOTIVATING TEAMS TO WORK UNDER PRESSURE

Team activities are often tied into deadlines that need to be met in the context of everything. For instance, in addition to serving in a task team in whatever capacity, normal work still needs to be done. This means that task teams and working groups in the field of education are more often operating under severe time constraints, which may be worsened by physical distance and poor communication infrastructure. When timelines are stringent and high quality output is expected, the woman team leader or project manager needs to play a constructive role.

### **TIPS ON MOTIVATING TEAMS**

- Inform the team why it is necessary for them to work at the pace and under the conditions they find themselves in.
- · Acknowledge without apologising that they are working under increased pressure.
- Work as hard or harder than you are asking them to. Always be last person to leave at the end of the day.
- Ensure that you can justify everything you ask them to do, and prioritise.
- If you ask them to do something they are not technically obliged to, make it easy for them to refuse. For example, treat working on holidays as a favour and appreciate it when they agree.
- · Keep the atmosphere fun and friendly.



### UNIT 5:

### **DEALING WITH PEOPLE PROBLEMS IN TEAMS**

People naturally are different and these individual differences make some people easier to get along and work with than others. A task-oriented type personality who wants things done well, and done yesterday, may appear as a difficult person to work with in the context of team members who thrive on doing their bit the very last minute.

### **OUTCOMES**

At the end of this unit, participants should be able to do the following:

- Identify team members experiencing personal problems.
- Identify team members creating problems.
- · Assist individual team members minimise stress.

### RECOGNISING THE PROBLEM

### **EXERCISE**

less interest, participates minimally and misses deadlines. What do you think might be the cause?
POSSIBLE REASONS

Suppose that one of your team members who has been very enthusiastic about the project and who at the beginning of the project contributed good ideas, suddenly shows

Recognise that what you see and observe might not be the problem itself, but merely the symptoms of an underlying problem.

There are a number of problems that are often perceived as signs of laziness, carelessness or bad attitude that could well be caused by personal problems over which the person has only limited control or no control at all.



### Here are some examples of the problems to note:

- A drop in productivity.
- Absenteeism.
- · Bad temper, irritability.
- · Time wasting.
- Missing deadlines.
- · Poor communication with others.
- Being quiet and distant.

## WHAT TO DO IF YOU NOTICE A CHANGE OF BEHAVIOUR IN TEAM MEMBERS

- Talk to the member privately.
- Indicate that your intention is to ensure that team goals are met and that the individual concerned has a crucial role to play in this regard.
- Ask whether the individual feels capable of continuing with team responsibility. If not, a replacement should be sought.
- Should a replacement be the only viable option, liase with the relevant office on seeking a replacement.
- In terms of reasons for replacement, respect confidentiality, but be careful not to create an impression that the person being replaced is just lazy.

### PREVENTING NEGATIVE STRESS IN TEAMS

Stress is not all negative. A certain amount of positive stress is conducive to optimal performance. Otherwise in a totally stress-free environment, team members easily slide to complacency.

Look at the table below and discuss in what way what is listed under 'stress factor' can lead to negative stress. In addition, indicate how this negative stress can be avoided.

STRESS FACTOR	PROPOSED SOLUTION
Deadlines	
Interruptions	
Poor performance	
Long hours	
Workload too heavy	
Poor prioritising	
Isolated working conditions	
Bad working relations	
Insecurity/fear of redundancy	
Organisational politics	



### SELF MANAGEMENT

### UNIT 6:

### PROBLEM PEOPLE

We do not choose who to work with and managers need to get the job done regardless of the characters they work with. This applies to both project teams as well as task teams. The woman manager needs to equip herself with knowledge, skills, attitude and behaviours that make her capable of dealing with difficult personalities.

### **OUTCOMES**

Having completed this unit, you will be able to:

- Identify different personalities.
- Work with people who have difficult personalities.
- Help teams rise above petty personal differences.
- · Focus your team on team goals.
- · Give feedback to team members.

# PERSONALITY TYPES AND TECHNIQUES FOR DEALING WITH PROBLEM PEOPLE

### **UNCOMMUNICATIVE PERSON**

These people are naturally slow in conversation. The problem associated with this behaviour is that such people may have brilliant ideas that they do not bother to communicate. They appear uncommitted and this frustrates the team, as the team never knows what the person is thinking and feeling about any issue.

### Tips on how to handle this type:

- Ask many questions to encourage communication, preferably open-ended questions unless you require commitment from them such as "can we hear what your experience is in this regard" or "I am aware that in your previous job you developed a communication strategy for the district, can you share your experiences with us?"
- Wait for a response.
- Compliment the person if their contribution adds value to the team.

### THE PERSON WHO DOES NOT LISTEN

These personalities are incredibly frustrating to the team because tasks often do not get done due to their inability to listen.

### Tips on how to handle this type:

- Do not appear as if you are picking on the person.
- Ask whether all team members understand what they need to do and focus your attention on the person who does not listen.
- Ask one of the team members to repeat what is to be done as a way of ensuring that everyone is comfortable with the instructions given.
- Another way on ensuring that they internalise what has been said is to ask them openended questions.





### THE DAYDREAMER

The problem with these personalities is that once they start day dreaming their productivity drops and the number of mistakes increases, thus affecting the whole team. They tend to daydream because they are bored.

### Tips on how to handle this type:

- Make them share tasks with someone active and enthusiastic.
- Set them productivity targets.
- · Avoid giving them monotonous work.

#### THE LONER

These personalities are not really team players. They can work in a team on defined objectives and defined roles. Otherwise, they need constant encouragement to participate, and when left on their own, they easily fade into the background, yet they can make a meaningful contribution with the right coaching.

### Tips on how to handle loners:

- Do not subject them to social pressure. Allow them their privacy.
- Minimise small talk in face-to-face interactions and focus on the task.
- Allocate them to teams that deal with issues in which they have expertise.
- Minimise small talk of a social nature in your team.

### **SECRETIVE PEOPLE**

These people tend to present the problem of keeping information from the rest of the team so as to gain a feeling of power. They often have a strong need for recognition.

### Tips on how to handle the secretive type:

- Make your request for information very specific and put it in writing where necessary.
- Be warm and generous with your 'thanks' when they give you information. Do this preferably in front of others.
- Take every opportunity to recognise them for their expertise/experience.

### THE SULKERS

People normally sulk to make others feel guilty about what they have done. Some people, however, sulk more frequently than others.

### Tips on how to handle this type:

- Listen to these people with an open mind. Explain the reason behind your view on the matter and act in a friendly and reasonable way.
- Do not perpetuate their sulky mode by nursing them. Act as though everything is normal.
- Make sure that you communicate the fact that your door is open for any queries or concerns.

#### **OVER-SENSITIVE PEOPLE**

These people make it impossible to discuss work objectively in a team, as any slight criticism is taken as a personal attack.



# Tips on how to handle over-sensitive people:

- As a matter of standard behaviour, be sensitive in the comments you make in front of others
- Be objective and specific in offering criticism.
- Cast your criticism in a manner that criticises the behaviour rather than the person. "I have pointed out that there is no room for missing deadlines in this project' as opposed to saying "you are always late".
- Balance criticism with feedback on what was done well.
- Your criticism must always be constructive, i.e. indicate what was done badly and offer suggestion on how he/she can improve.

#### THE MARTYR

These people have a tendency of always taking up extra work and moaning about it. They are prone to stress and make team members feel guilty about contributing/working less than the martyr does.

# Tips on how to handle this type:

- Do not allow them to take up extra work.
- If necessary, privately indicate your concern about the stress that they are likely to cause themselves.
- Give them plenty of recognition to boost their self-confidence and reduce this when they
  over work.

#### THE MOANER

Positive moaners bring genuine problems to the leader's and team's attention. They are often very conscientious workers. It is important that you, as a leader, keep these points in mind when your team comes to you to complain about these people.

# Tips on how to handle positive moaners:

- Consult with such personalities first about issues that directly affect them.
- Avoid putting them under pressure.
- Ask them if they need help before they can complain.

Negative moaners complain about everything and all the time and use complaining as an excuse for non-delivery. Chronic complainers use complaining as an excuse to mask their own inefficiency. Deal with negative moaners, after having heard their problems, by inviting them to propose solutions.

#### THE PESSIMIST

The advantage of having these people in your team is that they are often the ones who stop the team from making mistakes. However, they need careful handling so that their trait does not negatively affect the group.

#### Tips on how to handle this type:

- Ask them to be specific about their viewpoint.
- Ask them to present alternatives to what they are unhappy about. Why won't it work?
- Ask them for the worst-case scenario if action were to be taken.



• Relieve them of the fear of failure by assuring them that the responsibility for the task lies not with individuals, but the team.

#### THE PREJUDICED PERSON

There are many prejudices encountered in the work environment by women leaders, but not unique to women. Sexism is one example. Others include:

- Racism
- Age the dislike of working for people younger/older than they are.
- Social background.

Usually the most effective way of dealing with this type of person is through the feedback approach.

# Tips on how to handle this type

- Don't get into an argument about the issues to which these people are prejudiced.
- · Ask them why they feel the way they do.
- Highlight loopholes in their arguments.
- Cite instances that dispute their view-point.
- Adopt a principled approach.
- Speak to the person in private, and at a time when neither of you is in a rush.
- After having your say, allow the other person to have their say. Listen to them, and show them that you're listening.
- Focus on how they behave and not what they (in your view) are.
- Be prepared to quote actual instances wherever possible.
- Relate their behaviour to the task: point out how they are impairing the team's ability to get results.
- Be positive. Tell them when they have done well by not arguing, complaining or whatever. Show them that they can behave co-operatively.
- Suggest a solution and see how the other person feels.
- Listen to the other person's response and be willing to compromise.

## **EXERCISE**

You have a man in your team who does not believe that women are as capable as men in planning for the project that the team is tasked to do. The team agrees that there is a need for a group session to be facilitated to inform all the project team members about the project and to develop a project implementation plan. You have done this before. However, the man in question insists on external facilitation. You have neither the time nor the budget. How are you going to handle this situation?

#### THE "THIS JOB IS NOT MY WORK" TYPE

These people do not do anything that is not written down in their job description. Motivation for their behaviour is that they feel unappreciated, used and abused.

### Tips on how to handle this type:

- Know the rulebook like the back of your hand, because they do.
- When asking them to do something out of their job description, make them know that you view this as a favour.



- · If they refuse, accept it gracefully.
- Thank them generously when they do you a favour.
- Make it easy for them to refuse doing you a favour.
- Suggest to them that multi-skilling requires people to go outside of the traditional parameters.

## THE CONTROL FREAK

These are people who have the fear of and are nervous about being let down. Thus they do not delegate or share work. Not only do they want to control the outcome, but the process as well.

# Tips on how to handle control freaks

- Create an environment in which they can feel that they can trust people to perform to their highest standards.
- Keep them posted on the progress of events and ask for their advice where necessary.
- Encourage team members to admit to their mistakes and actively demonstrate that they have learned from them.
- Avoid making them work closely with people who are prone to making mistakes.

#### THE KNOW-ALL

These people are infuriating to the team, as they believe that not only do they know everything, but also that nobody else knows anything.

## Tips on how to handle this type:

- · Credit and boost the confidence of the team members who work with the know-it-all.
- Ask them to explain their ideas/plans so that they can spot their own mistakes. If they don't identify them ask them to focus on the area that you feel needs closer examination.
- Don't humiliate them in front of others.
- · Give shared credit.

# THE PRIMA DONNA

These people are prone to act like five-year-olds. They are essentially self-centred, not interested in team objectives, but have a personal agenda. These people have learnt that this behaviour gets them what they want.

# Tips on how to handle this type:

- Teach them that the behaviour they exhibit is not conducive to the team's success. Do not respond to it. Just ignore it.
- Avoid responding with emotions to their emotions.

#### THE ROWDY PERSON

These people are cheerful, jolly and well meaning, but their behaviour is frustrating, irritating and unproductive to their colleagues.

# Tips on how to handle this type:

- Handle them by having an informal word with then, being positive in your approach.
- If the problem does not diminish after the talk, use body language.



#### THE OVER-COMPETITIVE PERSON

The competitive spirit may be positive, but if it is excessive, it is destructive, as well as demoralising to the team.

# Tips on how to handle this type:

- Try to channel this person to compete against themselves and beat their own targets.
- Try to allocate them tasks where they will work independently.
- Encourage team play/spirit and working together.

# THE DOMINEERING PERSON

Bullies destroy real team spirit and for this reason, they need to be controlled.

# Tips on how to handle the domineering type:

- Domineers usually pick on younger, inexperienced members of the team. As a leader, you need to stand up for these people until they learn to stand up for themselves.
- Do not respond to their emotional outbursts.

#### THE AGGRESSIVE TYPE

These personalities are often insecure and need recognition and personal power.

# Tips on how to handle the aggressive type:

- Give them credit when they deserve it.
- Stand up to them firmly when necessary.

#### THE MANIPULATOR

Effective manipulators never leave any evidence. Therefore, you seldom have no proof of their manipulation. There is also no point in challenging them directly, as they will deny it.

# Tips on how to handle manipulators:

- · Make them feel that you want to help.
- Talk to them, without accusing them.
- · Figure out what they have to gain.

# THE RULE BENDER

The problems associated with these personalities are that they can get the team into trouble if their rule bending is uncovered. Team morale is broken, as the team does not appreciate their tactics.

## Tips on how to handle the rule bender:

- Find out what the impact of the broken rule has for the team.
- Deal with the matter in a team meeting but do not accuse the person. Discuss the fact surrounding the breaking of the rule.
- Stand up to the person and explain why the rule is in place.
- Find out why people deem it necessary to overlook the rule.



#### THE BUCK-PASSER

These people are full of excuses for not having done things. These excuses often implicate other team members.

# Tips on how to handle a buck passer:

- Be specific about the targets for the tasks you give them.
- Put all instructions in writing.
- Do not be side-tracked by him or her trying to blame someone else.
- Clarify the fact that they are the responsibility holder for the task no matter who is involved if that is their case.

In the teams you have worked in, what personality types were represented, and what was the impact of these types on team productivity.

PERSONALITY TYPES	IMPACT ON TEAM PRODUCTIVITY



# **UNIT 7:**

# **KEEPING TEAMS WORKING TOGETHER**

Many problems that threaten the team arise because two or more members do get not along for various reasons. As a team leader, you need to have the ability to identify these occurrences and respond promptly to them, in order to retain team spirit and morale.

#### **OUTCOMES**

After completing this unit, you will be able to:

- Deal with conflict between members.
- Address team factions.
- · Contain gossip.

## **CONFLICT IN THE TEAM**

This module has given you, as a woman manager and leader, the tools and ability to identify and address traits and issues which could result in team conflict. It is your responsibility as a leader to be on the lookout for these traits and issues and to act promptly in order to prevent them from affecting the team. It is the leader's role to reduce the chances of team conflict between members. The probability of successfully eliminating/containing team conflict is increased by the guidelines provided below.

- Make sure that everyone is in a functional and team role that suits them.
- Ensure that everyone is motivated, as an individual and as a team player.
- Ensure that all team members are clear about their objectives, both personally and as a collective.
- Do everything you can to minimise conflict within the team by handling people who are stressed or suffering from personal problems.
- Create a culture in which people feel able to come and talk to you when experiencing problems.
- Solve personality-related problems in your team by reducing the destructive effects of difficult personalities.

If you follow these guidelines, team conflict will be minimised. It would be folly to think that conflict can be eliminated. As a leader you need to make your team aware that the reduction of conflict is a team responsibility, that is, they share in the responsibility of reducing conflict within the team. You thus need to educate and equip them with the necessary skills for avoiding or dealing with team conflict.

## **COMMON CAUSES OF TEAM CONFLICT**

The first step is to make them aware of the common causes of team conflict, namely:

- The perception or feeling that one is doing an unfair share of work.
- The feeling of exclusion.
- · Personality clashes.

To deal with the problems mentioned above, the team needs certain skills in order to avoid/minimise the occurrence of the problems.



#### **UNFAIR WORKLOAD**

The team needs to accept that the objective of working together as a team is to use each individual's skill for the successful accomplishment of a substantial task. The team needs to be aware that to achieve the desired objective, co-operation and fairness in terms of allocated workload is vital, as this minimises the possibility of friction within the team.

# **FEELINGS OF EXCLUSION**

Team members should be educated to encourage each other to feel free to express any viewpoint relating to the team's work. Encourage the team members to make all relevant information available to the team. Encourage open meetings and discussions in which people speak freely on team or task-related issues. The team should adopt the rule that there are "no sacred cows".

## PERSONALITY CLASHES

All team members should be exposed to feedback techniques. They should also be encouraged to talk directly to each other, following feedback guidelines. Make team members aware of the value of compromising when operating in a team, in order to obtain a team objective harmoniously. Encourage team members to be sensitive and supportive towards each other.

As a leader, ensure that team members adhere to and practice these values, and that the team has the necessary skills and follows the aforementioned guidelines.

## **DEALING WITH FACTIONS WITHIN TEAMS**

There are three factors that can cause a split in a team. These are:

- Disagreement over policy issues, often rooted in ideological differences.
- Status battle between two senior team members.
- Rivalry between groups in the team, e.g. management versus union representatives which leads to 'us-them' syndrome.

Here are ways which can help you contain the factors mentioned above:

#### The policy issue split

- Identify the problem and take action early.
- Open the issue up in a team meeting and allow the team to make a decision on the issue.
- Once the decision is made, make it evident that it is final and binding to all team members.

# The status battle split

This situation is usually difficult to handle, as normally it emanates from two people pulling in different directions. To address these issues, follow these steps:

- Refocus the team on the team's needs and objectives.
- Get the two people together and mediate while they discuss their differences.
- Be unbiased and firm with the people involved. Highlight the negative impact that their battle is having on the team. Work towards reuniting the team.



# The group rivalry split

This type of faction usually arises when two or more teams are made to work together. It is not necessarily a bad thing. You just have to ensure that the atmosphere is friendly, as the problem could just be competition between the teams. If the atmosphere is not conducive to positive output, do the following:

- · Reshuffle some of the key players.
- Encourage the group or "new" team as individuals.
- Organise team social events.
- · Hold regular meetings.

#### **EXERCISE**

What is your contribution as a woman manager to team dynamics? Teamwork is a question of synergy, and it comes about as a result of complimentary roles. Have you ever taken the trouble to analyse what you bring into teams? If you have not, this is the opportunity.

MY OWN PERSONALITY TYPE PRODUCTIVITY	IMPACT ON TEAM	WHAT I WILL DO TO OVERCOME THIS?

This module has provided you with a reasonable amount of information, examples, factors and techniques to aid you in the understanding of groups as well as team dynamics. As a woman manager, you must always be:

- Aware of own behaviour and actions.
- Aware of behaviours of fellow team members.
- · Take positive steps to minimise the impact of negative team dynamics on productivity.



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#### INTRODUCTION

The use and advancement of technology like telephones, e-mail, video conferencing, etc. has made conventional meetings look like big time wasters. Nonetheless, this does not remove the need for women managers to know how to conduct successful meetings. The ability to conduct successful meetings forms part of their managerial responsibilities. This is more so today than before, as a result of the ethos of cooperative governance that the Department of Education (DoE) promotes. The meetings that women managers need to conduct are many and varied. The success of each one of them depends on the skill of the woman manager as convener.

## **BROAD AIMS**

- To equip the woman manager with the skills to conduct productive meetings.
- To understand the situations deserving of meetings.
- To understand the various types of meetings.
- How to deal with planned and unplanned meetings.
- To empower women managers with the skill of dealing with different personalities in meetings.

#### **ASSUMPTIONS**

- Meetings go beyond the question of legal compliance.
- Information shared in meetings is crucial for the proper governance and management of education.
- Participation in meetings should be on the basis of potential contributions to be made.
- Meetings are held to take decisions and the implementation of such decisions is the crucial function of managers, including women managers.
- To be taken seriously, women managers must effectively play a role of not only conducting meetings, but also implementing the decisions taken in meetings.



# **UNIT 1:**

# UNDERSTANDING MEETINGS

As a rule, meetings -a group of people coming together for a purpose should never be called if the purpose can be accomplished by a memo, an appointment or by telephone. Meetings are necessary only when the subject or problem to be discussed needs the meeting of minds and a collaborative effort. Meetings provide for interaction that is not provided for by memos and e-mails. Therefore, every time a meeting is held, there must be a purpose that goes beyond just interacting.

# Before calling a meeting, ask the following questions:

- Can the purpose be achieved by other means?
- If yes, what means would be efficient/effective?
- Is the outcome enriched by a collaborative effort?

#### **OUTCOMES**

#### By the end of this unit, women managers should be able to:

- Decide whether holding a meeting is the most effective vehicle for achieving a particular purpose.
- Identify the type of meeting that best suits the purpose to be achieved.
- Identify the requirements for various types of meetings.

#### **DEFINITION OF TERMS**

While the Oxford Dictionary defines meetings as the "coming together of a number of persons at a certain time and place especially for a discussion" today people can hold virtual meetings. The question of venue may no longer be that much of a requirement.

#### TYPES OF MEETINGS

There are various types of meetings that women managers in the field of education are likely to encounter. These include:

- · Statutory meetings.
- Managerial meetings.
- Creative meetings.
- Negotiating meetings.
- General meetings.
- Culture of Learning and Teaching Service (COLTS).
- · School Governing Body (SGB).
- Quality Assurance meetings.
- Transformation and Gender meetings (TG).
- Education management meetings.
- Education Management Development (EMD) meetings.
- Matric intervention meetings.
- Curriculum 2005 meetings.
- Staff meetings.



Most of these meetings have a defined purpose with predefined content.

#### STATUTORY MEETINGS

As the term suggests, this type of meeting is mandatory. It takes place:

- At intervals as stipulated by the law.
- Involves participants defined by law.
- For the purpose of formulating legislation.

#### MANAGERIAL MEETINGS

The manager of an organisation convenes this kind of meeting. People belonging to this committee are the management team. For example in a school you would have:

- The Principal.
- The Deputy Principal.
- The Vice Principal.
- Heads of Department -HoDs.

# Such meetings address issues of:

- · Policy formulation.
- · Planning.
- · Delegating.
- · Supervising.
- · Control.
- · Discussing goals.
- Feedback from various departments about developments.
- Troubleshooting.
- Systems and procedures.
- Strategies to improve the management of an organisation.

While these meetings are normally held on a regular basis, the organisations decide for themselves when to hold such meetings.

### CREATIVE MEETINGS OR BRAINSTORMING SESSIONS

The word "creative" is self-explanatory. In such meetings the staff propose new ideas and strategies for the organisation to adopt. Because of their nature they should be open to all rather than restricted to a particular category of staff.

#### **NEGOTIATING MEETINGS**

These meetings take place between two or more individuals or groups with the aim of seeking a solution to a particular problem. As a woman in management, you should take a positive part in negotiations. Thus:

- Know the subject to be negotiated.
- · Solicit a management standpoint.
- Substantiate your standpoint with policy applicable cases and laws.
- · Be informed about the subject.

Such meetings can be called by a manager, or by other parties who are involved. As a woman manager, you should use negotiating skills such as:listening, assessing informa-



tion, considering options (assessing the situation) and facilitating problem solving (helping parties reach resolutions).

It is imperative that a woman educational manager should be versatile and have conflict management skills for use where necessary.

# TIPS

- Know what the policy or legislative provision says on the matter.
- Listen to other parties.
- Weigh what they have to say against policy/legislative provisions.
- Communicate the policy/legislative provision.
- Try to see if a compromise can be reached.
- In cases of no compromise, emphasise your responsibility to manage the school/district office/regional office within the parameters of policy.

#### **GENERAL MEETINGS**

General meetings (GMs) are held annually in an organisation and are called by the chairperson of the Schools Governing Body. The general meeting seeks to:

- Give feedback to members about the progress of the organisation.
- Give opportunities to office-bearers to read their reports.
- Let the members analyse these reports.
- Give opportunity to the members to make quick and calculated submissions.
- Allow for resolutions to be proposed on reports and be adopted.

### TIPS

- Be thoroughly prepared for meetings.
- Strive for continuity.
- Retain the minutes of previous meetings.
- Follow formal meeting procedures by having an agenda and minutes.

# PARENTS 'MEETINGS

As the word indicates, this is a meeting for parents who have children at the school. The chairperson of the school governing body extends the invitation to all parents. Parents need to be given the following: seven days' notice, a copy of the agenda and a copy of the minutes of the previous meeting.

It is the SGB that decides when to hold such meetings. Although the chairperson of the SGB is responsible for meetings, the principal is responsible for facilitating such meetings by ensuring that:

The chairperson of the SGB is provided with all the administrative support needed to make such meetings a success. The support staff should ensure:

- The typing of minutes.
- The typing of the agenda.
- Circulation of both the minutes and the agenda.
- Dissemination of information about meetings.
- The arrangement of the venue and the required equipment.



As a manager in education, you should afford parents the opportunity to express their ideas. If you experience problems, you should invite them to give input. Remember that:

- They are entitled to contribute to their children's education.
- Their ideas should not be dismissed because they are poor or have little education.
- Provide the governing body with administrative back up to ensure the efficient running of such meetings.

# CULTURE OF LEARNING AND TEACHING SERVICES (COLTS) MEETINGS

These meetings are convened by co-ordinators at each of the following levels:national, provincial, regional, district, circuit and school.

This means that meetings at school level can refer important business to other meetings at higher levels; hence the need to time school-based meetings such that they efficiently feed into meetings at higher levels.

COLTS meetings serve to promote effective teaching and learning in schools. It would be advisable for the co-ordinator to be a qualified teacher, experienced at management level and a strategist.

As a woman manager who is involved in COLTS meetings, you need to:

- Be innovative capable of thinking of unorthodox ways of promoting learning (teaching).
- Be receptive open to other ideas.
- Be motivated to strive for the betterment of teaching and learning-have the interest of learners at heart.
- Provide leadership/direction.
- Steer meetings in the right direction.

#### SCHOOL GOVERNING BODY (SGB) MEETINGS

These meetings are convened to deal with all the matters affecting the school, educators, learners, parents and support staff. The composition of the SGB as prescribed by the Schools Act includes: parents, educators, support staff and learners (if it is a secondary school).

The chairperson is supposed to be the parent of a learner in that school. The chairperson calls and chairs the meetings. Normally, the whole body plans the dates on which to hold meetings. The SGB committee prepares the agenda for such meetings. The other issues that it deals with, during their meetings are, inter alia :

- · Safety and security.
- School development.
- · Fund-raising.
- Financial management.
- Codes of conduct for both educators and learners.
- Internal problems.
- · Improving results.

#### The role of the manager is to:

Co-ordinate these meetings.



- Provide administrative support.
- Ensure that proper logistical arrangements are made.
- Provide the necessary support to the chairperson of the SGB.

As a woman in education management, you need to involve all stakeholders in the running of the school as well as in decision-making, and ensure that the SGB is provided with the necessary support.

#### **QUALITY ASSURANCE MEETINGS**

Meetings of this nature are aimed at improving the quality of education. The members of the quality assurance committee are educationists and managers who:

- Strategise to improve results.
- · Conduct continuous assessments.
- Plan.
- · Organise.
- Direct.
- Evaluate learning materials.
- Facilitate change.
- · Develop teachers.

Quality assurance meetings also attempt to improve the product and performance in education. Every manager should seek to play an important role in initiating, managing and evaluating initiatives that aim to enhance the quality of teaching and learning in schools.

## TRANSFORMATION AND GENDER (TG) MEETINGS

Transformation and gender committees meet to facilitate change in an organisation. This change is about redressing the imbalances of the past. These committees aim at fighting discrimination in all its forms, such as gender, colour, creed, religion and social status.

It is true that, women were the most disadvantaged in the past. As such, these meetings seek ways to bring gender and equity balance to all education levels. Women managers in education need to contribute to the work of these committees because of the platform that they provide.

# **EDUCATION MANAGEMENT DEVELOPMENT (EMD) MEETINGS**

The EMD coordinator organises these meetings that seek to improve the management system in education, for the betterment of education management skills. The committee convenes to discuss inter alia, the following:

- Identifying the needs of education managers.
- Organising workshops and seminars for education managers.
- Planning the implementation of what is learnt during these seminars at school and education management levels.
- The training and development of school management teams.

# **ENHANCING EMD MEETINGS**

- Identify pertinent issues affecting women in management.
- Route the issue via proper channels to EMD meetings.



- · Keep track of the EMD resolutions.
- Follow up by taking advantage of opportunities created by the EMD forum.
- Monitor your own progress and route that information back to the EMD forum.

## MATRIC INTERVENTION MEETINGS

This committee is designed to specifically improve Matric results. The management section, administrative section, the examinations section and schools attend it. These committees meet to:

- Form subject committees.
- Identify the causes of poor Matric results.
- Seek solutions to the problems.
- Implement the strategies adopted to curb the situation.
- Find ways to motivate educators and learners.

# CONTRIBUTING MEANINGFULLY TO MATRIC INTERVENTION MEETINGS

- Familiarise yourself with the issues.
- Go beyond what you are aware of and solicit inputs from other Matric teachers at your school.
- Bring the problems to the forum.
- Propose solutions.
- Empower those you represent by reporting back on the resolutions of the meetings.
- Adopt information sharing as a habit.

As a manager in education, you may be able to use your position on such committees to see that effective ways are found to improve the quality of Matric results.

# **CURRICULUM 2005 MEETINGS**

The first of these meetings was held in 1996. Thereafter committees were formed at national, provincial, regional and district levels to:

- Find ways of implementing this new system of education.
- Monitor the implementation of this system.
- Evaluate the workability or viability of this system of education.
- Seek ways to improve the system now that it is operational.

This represents a shift from the goal-directed approach to the outcomes-based system of education. The onus lies with you to ensure that this new system works effectively.

# Role of woman managers:

- Familiarise yourself thoroughly with Curriculum 2005.
- Identify shortcomings in the implementation.
- Recognise the right communication channels.
- Route the identified problems through the right channels.
- Monitor and report on the implementation of Curriculum 2005 via the right channels.

# **STAFF MEETINGS**

All members of staff attend meetings of this nature. The management decides on the dates for such meetings, or they are convened when necessary. It is at such meetings that ideas



about organisational growth or development are shared. Staff meetings serve to create a bond between management and staff. Women in education management should use these meetings as a platform for:

- Discussing systems and procedures.
- Emphasising discipline.
- Planning.
- · Organising.
- · Delegating.
- Implementing.
- · Monitoring and evaluating.
- Curriculum development.
- · Motivation of staff members.
- Methods of improving results.

Staff meetings are known to be hair-raising. The success of staff meetings requires maturity on the part of the women managers and the following tips can be helpful in making such meetings a success.

# TIPS

- Keep an open mind.
- Encourage participants to raise issues.
- Do not personalise issues.
- Encourage participants to express other views.
- Do not take criticism as a personal attack.
- Encourage a joint seeking of solutions.

You will need a group of 4-6 people taking turns in acting key roles. At the end of each session evaluate each other, allocating marks out of 10. Repeat the exercise about 3 or 4 times. You as the principal have convened a meeting of quality assurance in your school so as to be able to make a submission to the district office. Decide on the agenda points. Chair a meeting in a manner that leads to adequate coverage of quality assurance matters in your school.

# IN YOUR PREPARATION INDICATE:

- (1) Who you will invite to the meeting and why.
- (2) How far in advance your invitations will be sent out.
- (3) Are such meetings as this one operational ones or policy formulation ones?
- (4) What seating arrangements will you opt for and why?
- (5) What other considerations will you need to Unit 2 Preparation for a Meeting



# **UNIT 2:**

#### PREPARATION FOR A MEETING

As previously stated, before one can hold or call a meeting, there must be a clear purpose for it. It is very common to find at the end of meetings that the real purpose did not tally with the ostensible purpose. In order to avoid this, it is important to follow the meeting preparation checklist:

- Determine the purpose.
- Set your objectives.
- Choose and contact the participants using objective criteria as in:is this an HoD 's meeting or general staff meeting?
- Choose the date, time and place, taking into consideration the logistics affecting meetings and participants, e.g. availability of transport/other events.
- Prepare an agenda, i.e. a list of items that need to be discussed at the meeting.
- · Notify the participants.
- · Set the stage.

It is important to note that some of the meetings have statutory requirements to follow. For example in the case of the meetings of the School Governing Body – parents are to be informed of these meetings 7 days in advance.

# **DETERMINING THE PURPOSE**

As a manager you should ask yourself: "What do I hope to achieve at the end of the meeting?" Most meetings are called to solve problems, exchange information or to discuss new policy directives. The purpose of the meeting determines:

- The format.
- · The time frame.
- The level of preparation by the participants.
- The level of input expected from participants.
- The amount of notice period given before the meeting. If the purpose of the meeting is to get full reports from HoDs about progress on certain issues in their departments, a day 's notice may be inappropriate.

# **SETTING YOUR OBJECTIVES**

Objectives must be specific – stating explicitly the exact outcome that is expected. For example, for an information sharing meeting, it is important to know what is expected of each participant -should they act on the information provided or are they expected to hear and appreciate what the Department is doing for them, in other words, leave the meeting with a positive attitude about the information provided.

For a problem-solving meeting, the objective may be to outline before the end of the meeting steps on how to compliment the solution, and within what time-frame. Communicate the objective of the meeting when announcing the meeting to orient the participants accordingly.



# CHOOSING THE PARTICIPANTS

Emanating from the objectives of the meeting, the woman manager should now be ready to consider who can best help in accomplishing the objectives.

Some meetings need to be attended by people occupying certain positions, e.g. people who do not occupy managerial positions cannot attend a management meeting. However, for brainstorming/problem solving sessions, it helps to broaden participation to include all staff. This communicates to them that they matter, as much as it inculcates a sense of ownership of the decisions taken.

Again, the people who are chosen should have the authority to take decisions. There is nothing as annoying and time-consuming as having people say: 'I will report to my superiors who will then take the decision on the matter.'

#### CONTACTING THE PARTICIPANTS

This should be done by the leader of the meeting timeously in order to determine a convenient date and time. She should be able to clearly explain the purpose of the meeting, advise participants of the contribution they can make and determine in the meantime specific requirements for the meeting, including equipment such as projectors and laptops.

#### SELECTING THE DATE AND VENUE

For women managers to participate effectively at meetings, considerations of the time, date and venue must include safety and other strategic needs of women in mind.

What is emphasised here is that after hours meetings, or meetings that are scheduled to take place at night, at dangerous venues etc should be avoided. The issue about the length of meetings is also important -meetings should in principle not last for more than an hour and a half. Should the leader feel that the subject to be discussed requires more than an hour and a half, it is recommended that more than one meeting be scheduled.

Alternatively, short breaks must be given after every 90 minutes. The consideration that the best time for meetings is in the morning is also important. This should be especially the case for problem-solving meetings, where a great deal of thinking is required.

Days for holding meetings should preferably be in mid-month and mid-week, with Mondays preferably being the last choice.

# **CHOOSING THE VENUE**

The appropriateness of the venue for the type of meeting being planned can either make or break the outcome of the meeting. Here, the major considerations should be:

- Safety.
- Purpose.
- Number of participants.
- Availability of venue.
- Special needs for the success of the meeting.
- Location.
- Seating arrangements.



- Table arrangements.
- Freedom from interruptions.

Room size is important in the sense that a small group may feel unsettled and lose touch with the issue being discussed, if the room is too big.

The shape of the venue and its fittings may also have an impact on the nature of interaction desired.

The room must be warm and inviting-this has been found to encourage attendance and participation at meetings. The colours with which the room is adorned, also tend to have a positive influence on the participants 'thinking instincts and negative ones if the colour scheme is uncoordinated.

#### **SEATING ARRANGEMENTS**

There are several ways of seating people at meetings. Depending on the size and purpose of the meeting, the following seating arrangements can be selected:

#### Theatre style

- Best for information meetings where the focus and attention is on one person.
- Ideal for larger meetings.
- Can accommodate many people in the least space.

# Schoolroom style

- Similar to the theatre style.
- Participants seated at desks or tables arranged in rows.
- Suitable for fewer participants needing to take notes.

# Banquet style

Tables are arranged in a 'u' shape and leaders occupy the open end of the 'u'. This is ideal for group discussions.

#### T-formation

Participants sit at one long table while the panel or leaders sit at a table placed across one end of the participant 's table

# TABLE ARRANGEMENTS

Very few adjustments can be made here because many rooms come equipped with a large oblong or rectangular table, which invariably will occupy most of the available space in the room

However, a few adjustments can be made in the seating arrangements around that table.

If the woman manager wants to be highly directorial in her leadership style, sitting at the head of the table is recommended. However, if the aim is to equalise the flow of communication and encourage participants to interact with each other, sitting off centre or near the middle of the table is suggested.



If however the woman manager wants to look like she is being democratic while monitoring her position of dominance, it is suggested she sits at the end seats on one side of the table and seat no one at the head of the table.

For greater participation and more equal sharing of information, nothing beats the round table situation. This is the most non-directive and equalising type of seating.

The challenge that the woman manager faces, therefore, is to strike the best balance among the options provided and choose what is best suited for her needs while making sure that the objectives of the meeting are achieved.

More and more people are holding meetings outside their offices the reason being a more relaxed atmosphere away from the office.

## THE WOMAN MANAGER MUST NOTE THE FOLLOWING

- If she chooses the more traditional, directive arrangement, she must expect the group to constantly look up to her for direction.
- If a more participative and democratic arrangement is chosen, more group participation can be expected.
- And if a highly formal off-site location is chosen, some degree of deviation from the topic should be expected.

## PREPARING AN AGENDA

What is an agenda? As stated earlier, this is a list of items that need to be discussed at the meeting. There are usually standard items-those that are recurring or ongoing or those arising from the previous minutes or items that needed to be followed up. New items going onto the agenda are usually those things that have developed since the previous meeting and that warrant a discussion.

Once the purpose of the meeting has been identified, the venue selected and participants chosen, the next step is to prepare an agenda. What is the purpose of the agenda? The preparation of the agenda is very important for the following reasons:

- Provides purpose for the meeting.
- Structure to the meeting.
- It indicates time allocations.
- For the ease of providing feedback.
- For the easy flow of the meeting.
- To enable the participants in the meeting to achieve the desired objective.
- Can be used as a measuring tool for the achievement of objectives.

Agendas should not be planned haphazardly, but should follow the proper sequence of activities in their proper order. Agenda preparation therefore requires ample time for whatever is to be discussed. It requires a sequence/flow. The agenda should be inviting/enticing to the participants. Guiding the person preparing the agenda should be:the understanding of what the participants should know or understand before they can move on to something else, and the time that should be allowed for comments and for presentations.



beware of rambling on and on unnecessarily.

Important to remember is the allocation of discussion time. This will not only allow the participants to hold their questions for discussion time but also will help the participants

Also, the sequencing of events is important. If a meeting is about solving a certain problem, there might well be another issue or two that the group might need to discuss. These smaller issues should not take precedence over the issue of the day in the hope that they will be got out of the way very fast, because they never do. Therefore, they should be regulated to the end of the meeting. Another reason for putting them at the very end is they also do not require a great deal of concentration or energy as the bigger issues do.

Documents that are needed for the meeting are also prepared before the meeting and distributed before the meeting starts. These may include such items as a copy of the previous minutes, and any other reports that need to be discussed at the meeting, e.g. financial statements, status reports, etc.

# TIPS

- Avoid lengthy agendas.
- Agendas must be written in point form and must not be narrative.
- If agendas are compiled by yourself, make sure you have a final check on them before they are sent out.
- Avoid handling documents during the meeting it distracts the meeting.
  - What is an agenda?
  - · Why are agendas important?
  - What do you think would happen if we ran meetings without agendas!
  - Give two important characteristics that good agendas should have.

#### NOTIFYING THE PARTICIPANTS

Letters of notification to participants about the meeting should arrive a week or two before the meeting, depending on how far and how near (some) participants are to the venue of the meeting. They should state the significance of the meeting, and what other obligations/ priorities should be attended to. Letters of notification should thus spell out all the necessary details about the meeting and what is envisaged to happen at the meeting. It is important that, closer to the date of the meeting, reminders accompanied by agendas, should follow.

### The following information is important when informing participants about the meeting:

- Meeting day, time and location.
- Meeting purpose and objective(s).
- Agenda (listing any special presentation with the presenters' names).
- Outline of what is expected from each participant, depending on the nature of the meeting.
- Personalised closing that encourages each participant, to anticipate a successful meeting.



# **FINAL PREPARATIONS**

On the day of the meeting, before the scheduled time:

- Double-check the availability of the venue.
- Confirm all menus and their delivery.
- Confirm that all the special requirements for the meeting are available.
- Finalise seating arrangements.
- Gather any other additional items.
- Make sure that proper arrangements for taking minutes are in order.
- Make sure that you arrive early at the venue to greet and welcome delegates.



# **UNIT 3:**

# CONDUCTING A MFFTING

# **CHAIRING A MEETING**

The woman manager chairing the meeting has a very important task at hand. Her function essentially is to:

- Make sure that support persons are seated at strategic positions -time-keeper, minutestaker, resource person(s).
- Welcome all the participants to the meeting and declare the meeting open.
- Explain the protocol/directive as to how the meeting will be run procedures, various responsibilities and people allocated these, like time-keeping, minute-taking, resource persons.
- Make sure the attendance register is signed by all present, and apologies noted.
- Specify time parameters-it is important that time is strictly adhered to.
- Allow participants to browse over the draft agenda, allowing room for additional items.
- Allow a few minutes for the review of the minutes and then move for their adoption.
- Check for matters arising from the previous meeting, i.e. those issues that needed to be
  followed up or further investigate and find out what has transpired since the last meeting.
- Control the meeting, ensuring that speakers stick to their topics and encouraging participation by all.
- · Maintain a balance in the meeting.
- Encourage a range of ideas.
- Discourage a clash of personalities.
- Deal severely with those who use abusive language.
- Ensure that meetings are conducted in legal and equitable manner.
- Close the meeting by summarising the achievements of the meeting, reminding the members of actions to be followed, by whom and within what time-frames.
- · Draw the participants 'attention to the date of next meeting, and
- Declare the meeting closed.

#### WHY TAKE MINUTES?

Minutes are important because they are the official record of what transpired at the meeting. Decisions to be taken will be based on them, and should there be some dispute about any issue at a later stage, they are referred to hence the review of the minutes at the beginning of each meeting.

Minutes should always, reflect the date, the time, the type of meeting and the members present and absent. They should be brief enough not to capture jokes and points made in passing/those not relevant to the topic, but detailed enough to capture all the salient points, follow-up actions, the persons responsible for these actions, and time-frames. Points discussed and decisions taken on those could be captured as "The meeting agreed. . . . ."

#### Things to avoid:

- Entertaining discussion of points that are not in the agenda.
- Violating meeting rules.



- Dominating the meeting.
- Steering the meeting in a direction to suit one 's own purpose.
- Mismanagement of time.
- Being unsure/indecisive.
- Not having all the necessary documents.

A good manager should always be on the lookout for the following characters at a meeting (see table below):

PERSONALITY TYPE	CHARACTERISTIC	HOW TO HANDLE
Shy	Always quiet.	Ask for their opinion.
Aggressive type	Always seeking recognition.	Allocate them tasks.
Manipulators	Swindle situations to suit them- selves-without leaving evidence.	Win their confidence so they can come out into the open as to their ultimate aim.
Dominator	Constantly informs other people about their opinions.	Never argue with him/her "otherwise people will not know the difference".
The blocker	Constantly argues without realising that other people's opinions could be correct.	Ignore or have a word separately with them.
Out of the field player	Chooses inappropriate behaviour for the situation.	Always have your points correctly so that you can prove them wrong.

## HOW TO HANDLE CONFLICT SITUATIONS IN A MEETING

- Strive for win/win situations, and not win/lose situations.
- If someone has to lose, that someone must lose gracefully.
- Get consensus on thorny issues.
- Avoid people who always have to have the last word.
- Separate antagonistic participants by either sitting between them or seat them next to each other.
- Use positive phrases to stimulate discussion.

## **ENCOURAGE PARTICIPATION**

- Make use of warm verbal and non-verbal communication.
- Address each participant by name.
- Ask opinion questions only.
- Protect shy people against dominators to the extent of interrupting them if it comes to a push.
- Do not hesitate to bring ramblers on line by reminding them of what is being discussed.

• Discourage "meetings within meetings" drawing in those engaging in separate meetings by asking them questions.

You dread the first meeting of each year because this is where you as a woman manager are expected to lead a discussion about Matric results, which for the past two years have been declining. In preparing for the first meeting of this year, adopt the tips given above. Play a role of the chairperson of this meeting in leading a discussion on "the previous year's Matric results and planning for the future".

Appoint others in your group to play the role of a time-keeper, record-keeper or minutes taker. Among the attendees of the meeting (i.e. the rest of the group) make sure that there are those who will act the talkative person, argumentative person etc.

- 1. Alternate the keyroles about twice.
- 2. Genuinely evaluate yourselves or ask the "meeting attendees" or those who were not assigned keyroles to evaluate you on the following: How did it feel being a chairperson/time-keeper/record-keeper? What did you find challenging in enacting these roles? What do you think are your shortcomings, if any? And how do you propose to address them?



# UNIT 4:

# **IMPROMPTU MEETINGS**

It is nice and good to plan meetings in advance so their success is ensured, but in education as in other business, there comes a time when a crisis that cannot wait arises. Should such circumstances arise, it is important to give the participants at least an hour within which they can finalise whatever they have been doing before they come to the meeting.

It is important that participants know what the meeting is about and how long it is expected to last. In principle, impromptu meetings should not last for more than half an hour.

It is important that the leader sticks to the agenda and not ramble on and on, taking advantage of the situation that has arisen.

# How can you tell if you had a productive meeting?

- The purpose will have been met.
- Participation ensured.
- Discussions were brief and direct.
- Agenda items covered within a specified time-frame.
- Problems highlighted with suggested possible solutions.
- Decisions taken and responsibilities for follow-up indicated.
- The team spirit prevailed -participants were supportive of each other, willing to work together and people were willing to compromise.
- The chairperson was able to control the meeting such that it was balanced.
- The atmosphere of the meeting was relaxed and friendly.
- · Openness and honesty prevailed.
- All inputs were welcomed and treated as valuable.
- Recording of issues was ensured.
- Issues agreed to at the end of the meeting were summarised.
- All are aware of the actions to be followed and the date of the next meeting.

Now that you have studied and completed the module on conducting effective meetings, in your groups of 4-6 discuss the following questions from what you have observed to be happening in your institution/school etc. Note down similarities/differences in the way things are done from one institution to the other.

- What are the major obstacles that women managers face in running effective meetings?
- · How do you think these obstacles can be overcome?
- Who do you think should provide the type of assistance needed?
- How participative are meetings in your institution?
- Who prepares the agenda for your meetings?
- Does the agenda usually meet the characteristics discussed above?
- Using the evaluation criteria on productive meetings, do you think the meetings in your institution school are usually productive?
- What changes do you think need to be made in the way your meetings are run, and how do you propose to effect those changes.



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