



DEPARTMENT OF EDUCATION

Women



in into
MANAGEMENT & Leadership
Positions





T

able of contents

1. Background to the module	(ii)
2. Pre-workshop diagnosis	(ii)
3. Practical considerations	(ii)
4. Practical activities	(ii)
5. Before you begin	(iii)
6. Dealing with unit outcomes	(iii)
7. Suggested time frames	(iii)
8. Exercises	(iii)
9. Allocation of time	(iii)
10. Follow-up activities	(iii)
11. Underlying assumptions	(iii)
12. Dealing with unit intended outcomes	1
Unit 1: Understanding assertiveness	1
Unit 2: Assertiveness in the context of rights and beliefs	6
Unit 3: Identifying and dealing with barriers that prevent woman managers from behaving assertively	9
Unit 4: Starting to be assertive in practical situations.	14
Unit 5: Handling one's own and others' anger.	19
Unit 6: Being assertive upwards.	21
Unit 7: In search of continuous improvement.	23
13. Workshop evaluation	23
14. Conclusion	23



FACILITATOR'S NOTES: ASSERTIVENESS TRAINING MODULE

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that the training manual is designed to be both a training manual and a resource book for women managers who, on their own, may need to sharpen their assertiveness skills. For that reason, it will be a futile exercise to blindly try to cover everything in a training workshop.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any form of training on assertiveness, may need all of the training module. Unless the training workshop extends over a day and a half it may not be possible to cover everything in depth.
- Select themes to be covered from the manual according to the identified needs.
- Decide on the degree of emphasis according to identified priority areas.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and that you should try to clarify your own understanding of the content, and your own attitude towards assertiveness before the workshop.
- Because the modules are in the OBE format, it also becomes important that time be set aside for practical exercises to determine whether unit outcomes have been reached. At the end of the module, participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS

WORKSHOP MATERIALS

- Training Module on Assertiveness
- Paper and pens
- Flipcharts
- 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

For personal development training interventions like this one, it is ideal to keep the numbers small, i.e. 15 at most, in order to create space for self-analysis, while creating space for small group interaction, where appropriate.

4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. This makes practical activities a vital part of training.



BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to question the participant's behaviour and habits. It therefore becomes important that the facilitator approaches this task with the sensitivity it deserves, while also creating a platform from which participants can gain insight into their own counterproductive ways of relating to others.

5. DEALING WITH UNIT OUTCOMES

At the beginning of each unit highlight the unit outcomes, and before you move to the next 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

The least amount of time that one can reserve for a module of this nature is one day. This is premised on the notion that the facilitator is able to select the themes that best address the needs of most participants, and therefore will not cover everything. In cases where everything is to be covered, at least one full day and a half will be needed. Even when everything is to be covered, it will still be helpful to conduct a pre-workshop needs assessment to determine the degree of emphasis required.

7. EXERCISES

The nature of this module calls for individual practical exercises and only allowing participants to share with the group on a voluntary basis. The purpose of these activities is to allow participants to gain self-insight. Balance your facilitator input with participant involvement.

8. ALLOCATION OF TIME

- This depends on the themes/units to be covered.
- Plan for at least 45 minutes per each unit.
- Use your judgement on what is to be emphasised, based on identified needs.
- Use pre-workshop diagnosis data as a basis for allocating time for themes.

9. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual behaviour change, and to determine the impact of training via questionnaires.

11. UNDERLYING ASSUMPTIONS *(page 1 of the Training Module)*

Spend some time teasing out the underlying assumptions to yourself because these constitute the philosophy on which the content is based. Keep in mind that in dealing with any subject there are various philosophical orientations that can be adopted. This is what allows the module to make sense.

BROAD AIMS OF THE MODULE *(page 1 of the Training Module)*

The preface covers broad aims of the module. The facilitator should acquaint himself/herself with these broad aims and further ask himself/herself the following questions:



- Which of these broad aims directly link with identified needs?
- Does a possibility exist that participants may have needs that they did not articulate?
- Since the module is structured such that each unit builds up to the next, is it possible to totally skip some units without compromising coherence?
- Is the facilitator reasonably comfortable with the philosophical orientation of the module?

Materials are designed around OBE principles and due to the specificity of the outcomes these are covered at unit level.

To encourage participant involvement right from the beginning, ask participants what they expect to get out of the workshop and whether there are any additional outcomes that they would like to get out of it. Put these up on the flipchart. This will be handy for determining whether the workshop was successful overall.

12. DEALING WITH PARTICIPANT EXPECTATIONS THAT ARE NOT IN LINE WITH WHAT THE WORKSHOP IS MEANT TO COVER

- Receive participant's input without censoring it, to send a message that what the participants have to say is important.
- Record the input again without censoring.
- Once all 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.

THE STRUCTURE OF THE FACILITATOR'S NOTES

The facilitator's manual highlights only those areas in the manual that deserve further elaboration. Your attention is drawn to the relevant sections of the manual. To operate efficiently, it is suggested that you pay close attention to areas where the facilitator's input is indicated in your training manual. Areas that are already clarified in the manual are not covered at all in the facilitator's notes.



UNIT 1:

UNDERSTANDING ASSERTIVENESS (p. 2).

FACILITATOR'S INPUT

UNIT OUTCOMES: (p. 2).

- Record the unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit workshop outcomes to determine the extent to which they have been achieved.

EXPLANATORY NOTES (p. 2).

Recognise that people are labelled as aggressive, assertive or submissive, not as a result of isolated instances, but as a function of how they regularly behave as a matter of habit or conditioning. So, caution participants to look at what is going to be discussed, based on behaviour patterns rather than isolated instances.

PRACTICAL EXERCISE (p. 3).

FACILITATION PROCESS

- Indicate to participants that they should complete this section in the training manual on their own (*Allocate 3 minutes*).
- Invite participants to take turns categorising the statements as submissive, assertive or aggressive behaviour.
- Check whether the group agrees.
- In cases of unanimous agreement, debate/discussion is not necessary. In cases of disagreement, allow short debates.
- If no agreement is reached put forward the correct answer and justify it.

FACILITATOR'S INPUT

EXPLANATORY NOTE (p. 4).

Body language is the communication of conscious and unconscious feelings through actions, gestures and body posture. We all know the old adage that actions speak louder than words.

PRACTICAL EXERCISE (p. 5).

FACILITATOR'S INPUT

- For each workshop, select 12 items from the list that you will give to participants as a practical exercise.
- Make sure that the 12 items represent assertive, aggressive and submissive behaviours evenly. Further, make sure that the items represent both body language and verbal language more or less equally.





THE FOLLOWING ARE EXAMPLES OF CORRECT ANSWERS (p. 4).

FACILITATOR'S INPUT

- These are correct answers.
- Do not open discussion on items where there is agreement.
- Let participants briefly state their views in cases of disagreement.
- Give the correct answer with a brief justification and move on.

SUBMISSIVE	ASSERTIVE	AGGRESSIVE
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 facing outwards	Bolt upright/leans forward; fist thumping or clenched; arms often folded; unapproachable
EYE CONTACT		
Avoids eye contact; looks down	Steady and firm without staring	Stares down and tries to dominate
VOICE AND SPEECH		
Voice often soft; speech hesitant and a tendency to mumble; slurred speech	Steady and clear tone with fewer hesitations and emphasis on important words	Usually fast, higher pitch and may even shout
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; eyebrows raised; chin thrust forward

PRACTICAL EXERCISE (p. 6).

FACILITATOR'S INPUT

Be aware that at this stage participants will still be warming up to the proceedings. Thus they may not participate voluntarily. It would be risky at this stage to try to coerce them to volunteer this information in a big group.

- Creating a safe environment for participants.
- Use pairs for practical activities at this stage.



FACILITATION APPROACH

- Ask participants to turn to a person seated next to them and to share the answers to the practical exercise in that context.
- After sharing, ask the participants to write their answers in their training manuals.

ADVANTAGES OF ASSERTIVENESS (p. 6).

FACILITATOR INPUT

Invite the participants to indicate if there are other advantages to being assertive:

- STEP 1** Record the input uncensored.
STEP 2 Tease out with the group.
STEP 3 Eliminate what needs to be eliminated.

DISADVANTAGES OF ASSERTIVENESS (p. 6).

FACILITATOR INPUT

Invite the participants to indicate if there are other disadvantages of being assertive:

- STEP 1** Record the input uncensored.
STEP 2 Tease out with the group.
STEP 3 Eliminate what needs to be eliminated, i.e. what, according to group consensus, deserves to be eliminated.

PRACTICAL EXERCISE (p. 7).

It often creates a nice ice-breaker for the facilitator to start by sharing what his/her personal areas of improvement are. This serves to communicate that we all have weaknesses that we have to strive to address. Share $\frac{2}{3}$ areas of improvement that apply to you personally and give an indication of actions you are taking to address these on your journey to becoming more assertive.

FACILITATION PROCESS

- Ask $\frac{2}{3}$ participants to volunteer their assessment of what they need to improve.
- Assess whether the action proposed is appropriate for addressing the identified area of improvement.
- Where there is a discrepancy between the gap to be filled and the action required to fill the gap, make some suggestions.

AREA OF IMPROVEMENT	ACTION TO BE TAKEN



PRACTICAL EXERCISE (pp. 7-8).

FACILITATOR'S INPUT

The purpose of this exercise is to illustrate how assertive, submissive and aggressive behaviour can manifest itself in the real work environment. It further illustrates that with attention and effort, counterproductive behaviour, whether submissive or aggressive, can be changed. This is an individual exercise that is meant to allow participants the opportunity to reflect on their own behaviours and actions.

The facilitator should recognise that there is only one correct way of characterising the behaviours. However, there are a variety of ways of modifying behaviour to become more assertive. Assess the participant's input in terms of whether it qualifies as assertive. The aim of the exercise is to change both submissive and aggressive behaviour into assertive behaviour.

The examples given are hypothetical. In modifying behaviour there is no single correct answer.

SITUATION	RESPONSE	CHARACTERISTIC BEHAVIOUR	MODIFY
1. A date is being set for the next meeting, which 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, you say ...	Well alright, it seems to be convenient for everyone else." ...	SUBMISSIVE as it creates an expectation that everyone agrees with the proposed date. This will lead to your missing one of the two and perhaps create an impression that you are not serious about your commitments.	" I realise that the proposed date suits everyone else. I already have another prescheduled commitment for that date. If no other alternative date can be found soon, the team can proceed and I will tender my apology for the next meeting".
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."	ASSERTIVE	No modification needed
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 anything other than my classes."	ASSERTIVE	No modification needed
4. A colleague undertook to perform a task for the 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..."	SUBMISSIVE	You should not be apologetic. Just indicate "Good-day, I am calling you to inquire about the status of the Report on X which you undertook to compile, and I need the information to report back in a meeting."



SITUATION	RESPONSE	CHARACTERISTIC BEHAVIOUR	MODIFY
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 extramural activities."	AGGRESSIVE	I appreciate your offering but your place seems to be quite full at the moment.
6. At a meeting the chairperson 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..."	AGGRESSIVE	Chair, I am afraid that proposal is in conflict with an earlier decision. I suppose since there is merit in the proposal the floor should be open to debate whether we should amend the earlier decision to accommodate the new proposal or whether we keep the status quo?
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 running seriously late."	ASSERTIVE	No need to modify.
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."	SUBMISSIVE	Approach the person who instructed you to attend and indicate to him/her that the meeting deals with matters pertaining to the provision of School Guidance and as such it will be more beneficial for the school to send the HOD Guidance.
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."	AGGRESSIVE	Thanks for your permission. I just would like to express my concern about the fact that your presentation seems to have omitted crucial aspects. e.g.



UNIT 2:

ASSERTIVENESS IN THE CONTEXT OF RIGHTS AND BELIEFS (p. 9).

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 9).

- Record unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to Unit 2.
- Before concluding this unit, revisit unit outcomes.

WHAT ARE RIGHTS (p. 9).

FACILITATION PROCESS

- Find out what participants understand by the concept of rights before dealing with the definitions in the manual.
- General rights are rooted in common law.
- Emphasise that rights do not exist in a vacuum and that rights come with responsibilities.

RIGHTS COME WITH RESPONSIBILITIES. IDENTIFY RESPONSIBILITIES THAT COME WITH THE FOLLOWING RIGHTS

PRACTICAL EXERCISE (p. 11).

BELIEFS (pp. 11-12).

FACILITATOR'S INPUT

Point out to participants that beliefs as discussed here have nothing to do with religion. This relates to those ideas that we hold about ourselves and others without any external proof or validation. These inform our behaviour and actions.

PRACTICAL EXERCISE (p. 13).

FACILITATOR'S INPUT

- Fill this table in a big group session.
- Do not entertain any elaborate discussions once the correct answer has been given.
- If no correct answers are given by the participants, refer to the Facilitator's Notes; give a correct answer with justification and move on.



The wording is not important. Focus on the meaning in assessing participant input.

RIGHTS	RESPONSIBILITIES
<ul style="list-style-type: none">• 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.	<ul style="list-style-type: none">• To deliver according to specifications and continue.
<ul style="list-style-type: none">• To have a say in selecting people who work within your immediate environment.	<ul style="list-style-type: none">• This applies to participation in the selection process via organised labour. It does not mean selecting people based on personal preferences. It is restricted to selection processes that are fair and transparent.
<ul style="list-style-type: none">• To make innocent mistakes.	<ul style="list-style-type: none">• To correct those mistakes once pointed out, and not to repeat them.
<ul style="list-style-type: none">• To expect work of a certain standard from people working for you.	<ul style="list-style-type: none">• To reward them accordingly if the standards are met.
<ul style="list-style-type: none">• To criticise performance of staff if it falls below certain standards.	<ul style="list-style-type: none">• To provide coaching and point out how performance can be improved.

THE EFFECT OF BELIEFS ON BEHAVIOUR (p. 12).

FACILITATOR'S INPUT

- Invite participants to explain the diagram on p.12.
- Guidelines to explaining the diagram on p.12.

The beliefs that you hold determine the rights you grant yourself and others, e.g. if you believe that you are better than everyone else, you see yourself as having the right to do anything (*after all who can tell you*). The behaviour you exhibit, based on the rights you have given yourself, leads to arrogant behaviour characterised by lack of respect for other people's rights. Unless someone stands up to you to challenge your behaviour and indirectly your beliefs, you are likely to continue behaving in that fashion, thereby causing considerable irritation and annoyance to others.

Should someone do you the favour of challenging your behaviour, and you learn from that experience, you will more than likely modify your beliefs, as you learn that not only do other people have rights, but they are also prepared to stand up and defend their rights.

EXPLANATORY NOTE (p. 12).

Based on the rights guaranteed by the Constitution and other legislation, women managers must be aware of what they can and cannot do in their quest to grow in their careers. Knowledge of what can and cannot be done is helpful in assisting women to remain on the side of the law as they execute their managerial responsibilities. Furthermore it equips them with the knowledge they need to be able to deal with cases where their own rights may be violated.





These are merely examples. Participants' responses must be assessed against the background of the specific legal right in question (p.13).

SUBMISSIVE	WHAT CAN BE DONE	WHAT CANNOT BE DONE
1. The right to fair and equal treatment (Constitution)	Treat all your subordinates including job applicants equally and fairly.	Giving preferential treatment to some of your subordinates, e.g. jobs for friends and family.
2. Freedom of association guaranteed by the LRA.	Respect the right of all employees to affiliate.	Victimising employees because of their union affiliation.
3. Freedom of speech guaranteed by the Constitution.	Encourage free speech as long as free speech does not involve divulging information of a confidential nature and it is not of a defamatory nature.	Threatening staff who talk about issues that may be related to mismanagement.
4. Right of access to relevant information that is not of a confidential nature.	Give staff information and develop an information-sharing culture.	Divulging information that is of a personal/confidential nature under the guise of right of access to information
5. Right to a fair hearing in terms of disciplinary issues.	Follow the Doc disciplinary code to the last detail.	Firing a person without due process or subjecting the accused employee to an unfair process or discussing a case that is still under investigation
6. Presumption of innocence until proven guilty.	Presumption of innocence until proven guilty.	Prejudging the case prior to a hearing.
7. Right to a fair selection and recruitment procedure.	Treat all job applicants fairly – both internal and external applicants.	Preferential treatment of some applicants and subjecting applicants for the same job to different standards in terms of interviewing
8. Right to family responsibility time off.	Require proof for family responsibility leave taken.	Family responsibility leave cannot exceed the number of days prescribed by DOE policy
9. Right to a fair hearing.	Composition of a disciplinary panel that has not in any way had prior involvement with the case.	Subjecting the accused to a panel and process that is biased
10. Right to remain silent.	The accused can choose not to respond to the allegations/questions made against him/her.	Force the accused to answer certain questions



UNIT 3:

IDENTIFYING AND DEALING WITH BARRIERS THAT PREVENT WOMAN MANAGERS FROM BEHAVING ASSERTIVELY (p. 14).

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 14).

- Record the unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight other participant expectations that relate to Unit 3.
- Before concluding the unit revisit the unit outcomes.

FACILITATOR'S INPUT (p. 14).

- Give the following generic definitions.
- What is a barrier? A barrier is anything that prevents one from reaching the desired outcome.
- Attitude refers to a tendency to respond in a certain manner. It excludes isolated instances caused by external factors.

SELF-AFFIRMATION STATEMENTS

WHEN AND HOW TO USE SELF-AFFIRMATION STATEMENTS.

These statements are helpful especially if one holds beliefs that militate against assertive behaviour. The more the participant repeats the self-affirmation statements to herself, the more she internalises the message in these statements, and the better she feels about herself.

MODIFYING BELIEFS (p. 16).

FACILITATOR'S INPUT

STEP 1 (p. 16).

Encourage participants to reflect in a manner that is objective, stressing that unless they are honest about beliefs and behaviour that hold them back, they cannot effect behaviour changes. The following is a list of beliefs common among women that tend to hold the women concerned back.





These are mere examples. Participants may come up with a variety of responses.

BELIEF	WHY IT NEEDS TO BE CHANGED
I am the best.	Prevents you from learning from others and makes others unwilling to contribute ideas.
If I make mistakes people will laugh at me.	It prevents you from taking risks and without calculated risk taking there is no growth
It is better to keep quiet than to risk appearing stupid.	No question is stupid because answers to questions enhance one's understanding. Not asking prevents you from learning
I will not rock the boat, otherwise others will not like me.	As a manager it is your duty to steer the ship in the right direction. You would rather be unpopular with a ship heading in the right direction, than be popular in a sinking ship,
I am not good enough.	This sense of inferiority prevents you from realising your potential. Soon you begin to act this role and this leads to a self-fulfilling prophecy
I am not attractive enough.	Your physical appearance is not part of your job requirement! You are not a model. So regardless of your looks you can get your job done. What is important is making sure you project a professional image.

MODIFYING BELIEFS

STEP 2 (p. 16).

Encourage participants to contrast the belief with specific instances in which they have acted/ behaved in a manner that is opposite to the belief. Here the participants are encouraged to challenge their own beliefs about themselves. As participants recall instances where they behaved in a manner opposite to the negative beliefs they hold about themselves, they begin to realise that the beliefs they hold about themselves are not necessarily true.



These are examples. Participants are expected to come up with answers rooted in their own experiences.

BELIEF	INSTANCES WHERE BELIEF WAS REFUTED
Only stupid people ask questions.	A colleague asked questions, and the discussions that followed led to revisiting the plan.
I am not attractive enough.	Remember the time when I made a moving presentation, and I received a standing ovation from the audience. This being an indication that in professional settings people respond to ideas and their presentation rather than to physical looks.
Male co-workers do not like me.	Remember an instance in which I had a lively debate with my superior in which he clearly demonstrated respect for my point of view and the debate concerned the differences in our ideological orientations.
Maybe I am not meant to be a leader.	Remember instances where, because you took charge, you were able to break the impasse and actually averted a student strike. That is leadership!
To keep everyone happy I should not ruffle any feathers.	Remember the instance when you insisted that schedules for term marks needed to be submitted on time. Although not everyone liked it, that allowed the school to finalise its business on time and to start the new term on a new slate. Everyone made a comment about how nice it was to start without a backlog!

STEPS 3 (p. 16).

FACILITATION PROCESS

- Refer to the example on page 15/16 and invite participants to identify the counterproductive behaviour patterns they hold and to complete steps 3 & 4 in the training manual.
- Allocate about 7 minutes for this exercise.

GENDER DIFFERENCES BETWEEN MALES AND FEMALES (p. 17).

FACILITATOR INPUT

Emphasise that the gender differences refer more so to general tendencies than to the specific behaviour of individuals. In other words, there are cases where individual females do not exhibit these tendencies while there can be instances where males exhibit what are otherwise considered to be female tendencies.

EXAMPLE (p. 17).

Refer participants to the module *Conduct Productive Meetings* for a detailed description of how to prepare for a meeting.



EXPLANATORY NOTE

- Modifying your own behaviour means:
- Consciously wearing a different cap than you previously had.
- Leading by example, i.e. by your own actions you demonstrate the behaviour that you would like participants in a meeting to follow.
- When someone steps out of line you subtly bring him/her back on track, e.g. give "the look". The intention is to demonstrate that you are in serious business.

CULTURE (p. 18).

FACILITATOR'S INPUT

Culture is not static but dynamic. In every culture there are positive and negative elements. Women managers must be encouraged to challenge those aspects of culture that impede their progress.

WHICH OF THE FOLLOWING BELIEFS ABOUT MEN AND WOMEN DO YOU HOLD TO BE TRUE AND WHAT ARE THE EFFECTS OF YOUR BELIEFS ON YOUR BEHAVIOUR?

FACILITATION PROCESS

State the belief and invite those participants who hold that belief to indicate how it affects their assertiveness. Keep in mind that some of the beliefs listed will not be held by participants or the participants may not even be aware they hold such beliefs, in which case you can use the examples provided.

Some beliefs about men and the general effects of such beliefs on assertiveness is the starting point for a continuous process of challenging such beliefs. The following are examples of beliefs held by some women about men (p.18):

BELIEF	EFFECTS ON YOUR ASSERTIVENESS
Men are superior.	Makes it difficult for me to approach men and reprimand them if they have done something wrong. It makes it difficult for me to challenge ideas put forward by male colleagues
Women must always respect men.	Where disciplinary issues are involved, I feel that the disciplining of a man by a woman amounts to humiliating a man
To be assertive is un-feminine.	In an argument with males I give up even if my point is valid as I do not wish to be perceived as un-feminine It is rude to instruct an older person.
It is rude to instruct an older person.	I have serious difficulty handling two lady teachers in my school. They do as they please because they know that my upbringing makes it difficult for me to reprimand them. When I reprimanded them via written memos they indicated that that is a violation of LRA, as I cannot give them a written warning before giving them a verbal warning.



CHALLENGING THE FAULTY BELIEF/THOUGHT (p. 19).

FACILITATOR'S INPUT

Explain to the participants that the purpose of the exercise is to begin to challenge some of the beliefs that they hold which prevent them from being assertive, by recalling instances where their beliefs were refuted.

FACILITATION PROCESS

- Give participants a chance to jog their memories and to remember instances where their beliefs were refuted.
- Write that down next to the belief concerned in the Training Manual.
- Allow those who are ready to share such instances with the group.
- Recognise that participants will complete in their Manuals only issues relating to the beliefs they need to modify.
- The following is a list of examples:

EXAMPLES (p. 19):

Share one example to give participants a sense of what the exercise is about if participants seem lost. Participants should further unpack the beliefs they identified in the previous exercise, to take the process further.

BELIEF	INSTANCES WHERE BELIEFS NEGATED
Men are superior.	Think of male colleague Y, B, etc. and remember their mistakes. Men, like everyone else are human. They have strong points and weak points
Women must always respect men.	Think of instances where a male boss proved not deserving of the respect you accorded him. Respect is given up to the point when one proves to be unworthy of respect
To be assertive is un-feminine.	Think of instances where you politely put your point of view across, much to the delight of those present at the meeting!
It is rude to instruct an older person.	Think of instances where, because of your position, you have had to coach an older member of staff who was quite appreciative of coaching



UNIT 4:

STARTING TO BE ASSERTIVE IN PRACTICAL SITUATIONS (p. 20)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 20):

- Record unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to this unit.
- Before you conclude the unit, revisit unit outcomes

4.1. MAKING REQUESTS (p. 21).

FACILITATOR'S INPUT

INSTRUCTIONS TO PARTICIPANTS:

- Look at Column 1 and Column 2. Out of every 2 options given, choose one.
- Tick the option that describes how you generally feel.
- After ticking numbers 1 to 6, determine where most of your ticks fall, i.e. under Column 1 or 2.

4.1 MEANING OF RATINGS:

- Many (4 or more) Column 1 ratings: A tendency towards submissive behaviour.
- Many (4 or more) Column 2 ratings: A tendency towards aggressive/arrogant behaviour.

DISAGREEING AND STATING YOUR POINT (p. 21).

Emphasise the difference between disagreeing with the behaviour/idea and disagreeing with the person. The idea is to keep your disagreements focused on the issue that you disagree with, rather than personalising them.

GIVING PRAISE (p. 22).

Women managers are inclined to spontaneously praise subordinates and co-workers. This is quite important as it makes staff feel that their efforts and contributions are valued and important. Give praise only if you mean it!

CULTURAL DIFFERENCES IN HANDLING OF PRAISE (p. 23).

When giving praise do not automatically assume that lack of graceful acceptance of praise is awkwardness in the handling of praise. Even assertive individuals can feel awkward about receiving praise if they come from a cultural orientation that emphasises humility and group achievement above individual achievement.



PRACTICAL EXERCISE ON RECEIVING PRAISE (p. 23).

Oh it was nothing much really – SUBMISSIVE
I think you were good too- SUBMISSIVE
Well I am not good at all. It is X who is brilliant at organising – SUBMISSIVE
Well what can I say: I am the best – AGGRESSIVE
You thought that was good, I thought it was second rate myself – AGGRESSIVE
I am not sure how I came across; I was pretty nervous – SUBMISSIVE

PRACTICAL EXERCISES ON RECEIVING ASSERTIVELY/INTERNAL DIALOGUES (pp. 24-25).

Inner dialogue is that self-talk that we have with ourselves, especially in times of trouble.
Examples of inner dialogue:

"She is a master at blowing things out of proportion" (1)
" What I did is no big deal (1)
"There he goes again" (habit) (1)
" Always ready to find something wrong" (1)
" He cannot help but put men/ women down"(1)
" Oh I have messed up again" (2)
" What is wrong with me? I do not seem to do anything right" (2)
" I just can't seem to get it right" (2)

- (1) Represents an aggressive orientation - blaming it on the person giving criticism or,
(2) Excessive self-blame which makes one deal with criticism in a manner that blames oneself regardless of whether that is justified or not.



FACILITATOR INPUT

- On a flip chart, record examples given above.
- After categorising each one as either submissive/aggressive, invite participants to modify the self-talk to assertive.
- The list that follows gives examples.
- Allow brief discussion, only in cases of disagreement.

MODIFYING SELF-TALK TO DEAL WITH CRITICISM ASSERTIVELY (p. 25).

AGGRESSIVE/SUBMISSIVE	ASSERTIVE
"He/she is always nit-picking" (Scapegoat)	Let me hear him out; maybe he has a point
"She is a master at blowing things out of proportion"(what I did is no big deal)	She is right; I did not give this project the attention it deserved. I will plan more carefully next time
"There he goes again" (habit).	Well this is a different issue from the issue I was criticised for 2 days ago
"Always ready to find something wrong" (hypocritical).	Although he appears hypocritical, the criticism that he gives is often constructive.
He cannot help but put men/women down"	Let me try to see this as an attempt to correct behaviour that happens to have been committed by a woman
"Oh, I have messed up again" (excessive self-blame).	I have made a mistake. This presents me with the opportunity to learn
" I just can't seem to get it right" (Self-Denigration).	If I give myself enough time, I can get this right; next time i will start early so I can give the draft to X for review
"What is wrong with me? I do not seem to do anything right" (self-denigration)	Calculations were never my strong point. I just need to ask for help

FACILITATOR'S INPUT

- Go over the section on receiving criticism assertively (p. 24).
- The key to receiving criticism assertively is to:
 - Keep an open mind.
 - Hear the person giving criticism out.
- Modify negative self-talk so that you remove blockages. Whether your self-talk takes the form of trivialising the criticism by blaming the person giving it, or takes the form of excessively blaming yourself, it detracts from the real issue, i.e. the behaviour being criticised.



ROLE PLAY (p. 28).

INVITE 2 PAIRS OF PARTICIPANTS AND 1 INDIVIDUAL TO VOLUNTEER TO PLAY THE FOLLOWING ROLES:

1. In the first pair, one gives and the other one accepts praise assertively.
2. The second pair plays the role of an assertive giver and assertive receiver of bad news.
3. The third individual volunteers to be the giver of bad news at a staff meeting, with the participants serving as staff.

FACILITATION PROCESS

- In the first two instances the pairs role-play after reading the scenario in the manual, while being observed by the rest of the participants, whose role is to give constructive feedback at the end.
- In the case of a staff meeting, the volunteer reads the scenario in the manual before playing a role of giving bad news at the staff meeting.
- Allow about 6 minutes for feedback for all the role-plays.

EXAMPLES OF POSSIBLE ANSWERS FOR PRACTICAL EXERCISES

A. ACCEPTING PRAISE ASSERTIVELY

"Thank you sir/ madam. Well, it was not easy because it meant sacrificing some of my personal hobbies. I structured my work and activities such that I would do leisure activities as a reward for having completed an assignment or work responsibility. I cut down on my social life and lost friends in the process, but I feel the sacrifice was well worth it".

B. GIVING BAD NEWS IN THE STAFF MEETING

"For now, what I can indicate is that the grapevine story is not true. The matter will be discussed at the next staff meeting."

IN THE MEETING

"Well, I am afraid I do not have good news on the staffing situation. The official correspondence I received suggests that our school has not been given any extra posts, and as a result the workload will be as heavy as last year. The most I can do is to keep nagging."



C. RECEIVING CRITICISM THAT YOU DO NOT AGREE WITH

"I hear what you are saying but I believe that what I did, i.e. call the police, was in the best interests of the staff and learners who were being coerced to participate. It was also in the interest of protecting school property, staff and learners who were not part of the mob. The arrival of the SAPS was enough to persuade the rioting learners to disperse without any further events. I would however like to hear from you how you would have handled it, maybe I can learn from that."

D. GIVING CRITICISM

"Mr. X, I have received a complaint from a parent who claims Mr. H administered corporal punishment to his son. I have assured the parent that the matter will be investigated and dealt with accordingly, since corporal punishment is not permissible by law. I have investigated this matter and the indication is that you did administer corporal punishment. I want to give you a fair chance and I require you to provide my office with a written report within 3 working days. I want to emphasise to you that nobody is above the law."

GUIDELINES FOR GIVING CRITICISM ASSERTIVELY (p. 27).

FACILITATOR PLEASE NOTE:

Note that although these are guidelines the steps followed should be regarded as sequential and should be followed step by step because skipping any one of them, or reversing the order, leads to failure to communicate the criticism constructively or failure to get a commitment to a resolution.



UNIT 5:

HANDLING ONE'S OWN ANGER AND AGGRESSION AS WELL AS THE ANGER AND AGGRESSION OF OTHERS (p. 29).

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 29).

- Record unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to this unit.
- Before concluding this unit, revisit the unit outcomes.

FACILITATOR'S INPUT

EXPLANATORY NOTE

CAUSES OF ANGER (p. 29).

- Caution the participants about the danger of getting angry over nothing by not checking your own understanding of the situation.
- Cross-cultural differences may lead to different interpretations of what is being said. What is funny to one cultural group can be downright offensive to people coming from a different cultural orientation.

There is also no room in any work environment for jokes about other races, religions, women, men, tribes, etc. Such "jokes" are discriminatory, offensive, etc.





EXPLANATION ON USING THE GUIDELINE (p. 31).

STEP 1

- Do whatever makes you feel better/ prevents you from exploding.
- Recognise that different people have different coping mechanisms.

STEP 2

- This step is necessary for checking your own understanding of what is happening/being said.

STEP 3

- You can say something like " I recognise/realise that you are very upset but I still do not understand what you mean by X or how you perceive what happened to be my fault."

STEP 4

POINTING OUT DISCREPANCY BETWEEN VIEWPOINTS

- I still maintain that the portion of the report that I was given responsibility for was generated and handed to the project co-ordinator at least 5 days before the due date because I knew I was going to be writing my exams last week. So I still maintain that I am not in any way responsible for the late submission of the report.

STEP 5

- I am very unhappy about the accusation you are making against me. I am also irritated that you criticised me without even hearing my side of the story.

STEP 6

STATE POSSIBLE CONSEQUENCES

If you approach me like that again I will lay a grievance against you.

STEP 7

Thanks, I consider this topic closed!



UNIT 6: BEING ASSERTIVE UPWARDS *(p. 32).*

FACILITATOR'S INPUT

UNIT OUTCOMES *(p. 32).*

- Record unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to this unit.
- Before concluding the unit, revisit unit outcomes.

EXPLANATORY NOTE

Emphasise that the skills that apply to assertiveness are no different from skills needed to behave assertively in dealing with superiors. What needs to happen to achieve this is:

- Challenging beliefs that one may hold about management.
- Develop a respect for ideas rather than ranks and individuals.
- Acknowledge the rights of senior management.

PRACTICAL EXERCISE

NOTE THAT THIS ROLE-PLAY IS NOT INCLUDED IN THE TRAINING MODULE

In a meeting involving the district officials you have always felt intimidated. You were sent as a representative of your school to a meeting where strategies to improve matric results were to be discussed. A district official who is always pressed for time announces a resolution before the matter is fully debated. The resolution is that study time should be provided for in the morning and you know this will never work for your school as school starts at 7:40. Apart from the fact that this will reduce the study time to only 40 minutes, you also know that because of the public transport situation in your area, learners will not be able to make it for 7:00 am. Disagree and state your doubts assertively



FACILITATION PROCESS

- Read the above scenario to all participants.
- Participants are to write salient points in their training manuals.
- Ask participants to volunteer for the following roles.

HANDLING PRACTICAL CONSIDERATION (p. 33).

- Spend some time teasing these out, as valuable contributions are sometimes lost because of the way these contributions are made.
- **ASSIGN THE FOLLOWING ROLES:**
 - A female HOD with a tendency to dominate meetings.
 - 4/5 - other participants in this meeting.
 - The rest of the participants observe proceedings and give constructive feedback.
 - Allocate 5 minutes for role play/ 5 minutes for feedback.

After collecting feedback from observers, add what you observed that was not covered.



UNIT 7:

IN SEARCH OF CONTINUOUS IMPROVEMENT (p. 34).

UNIT OUTCOMES (p. 34).

- Record unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to this unit.

FACILITATOR'S INPUT

GO OVER THE MATERIAL COVERED ON PAGE 34 ONWARDS, EMPHASISING THE FOLLOWING:

- Moving from aggressive or submissive behaviour to assertive behaviour is a journey.
- As such, it needs practice.
- Some days will be better than others.
- Some situations will be more amenable to assertive behaviour than others.
- Your responsibility as a woman manager is to make sure you:
 - Read situations correctly.
 - Assert yourself in ways that do not violate rights of others.
 - Encourage other women and your team in general to assert themselves.
 - Concede in cases where you have made a mistake.
 - Assert yourself in ways that are empowering to yourself and others.

GOOD LUCK

13. 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.

14. 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.



T

able of contents

1. Background to the module	2
2. Pre-workshop diagnosis	2
3. Practical considerations	2
4. Practical activities	3
5. Before you begin	3
6. Dealing with unit outcomes	3
7. Suggested time frames	3
8. Practical exercises	3
9. Allocation of time	3
10. Follow-up activities	3
11. Preface to the module	4
12. Broad aims of the module	4
13. Dealing with participants' expectations	4
14. The structure of the facilitator's notes	4
Unit 1: Understanding groups	5
Unit 2: Teams	8
Unit 3: Team functions	10
Unit 4: Keeping teams motivated	11
Unit 5: Dealing with people problems	13
Unit 6: Problem people	16
Unit 7: Keeping teams working together	19
15. Workshop evaluation	20
16. Conclusion	20





FACILITATOR'S NOTES: TEAM AND GROUP DYNAMICS TRAINING MODULE

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that the training manual is designed to be both a training manual and a resource book for women managers who, on their own, may need to sharpen their skills in the area of team building and group dynamics. Hence, in facilitating workshops, keep in mind that it will be a futile exercise to try to cover everything.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any training on team and group dynamics or team building may need the entire training module. Unless the training workshop extends over a day and a half, it may not be possible to cover everything in depth.
- Also decide on the degree of emphasis to be given to various aspects, 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 pre-workshop diagnosis.
- It is crucial that the facilitator be reasonably comfortable with the content of the module and should try to clarify his/her own understanding of the content before the workshop.
- Given that the modules are in the OBE format, it becomes important that time be set aside for practical exercises in order to determine whether unit outcomes have been reached.
- At the end of the whole module, participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

- Training Module on Team and Group Dynamics - Building Effective Teams.
- 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

For personal development training interventions like this one, it is ideal to keep the numbers small, i.e. 15 at most, in order to create space for interaction within the big group and in small groups, as well as for self-analysis.

4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. This makes practical activities a vital part of training. Furthermore, the practice of requiring participants to report back also offers them an opportunity to polish their public speaking and communication skills.

5. BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to question participants' behaviour and habits. It therefore becomes important that the facilitator approaches this task with the sensitivity it deserves, while also creating a platform from which participants can gain insight into their own shortcomings in relating to others.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit, highlight the intended unit outcomes, and before you move to the next unit, check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

The least amount of time one can get by with is one day. This is premised on the notion that the facilitator is able to select the themes that best address the needs of most participants, and will therefore try to not cover everything. If everything is to be covered, at least two full days will be needed.

8. PRACTICAL EXERCISES

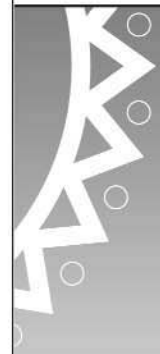
The nature of this module calls for individual involvement in doing practical exercises and voluntary sharing with the group. The purpose of these activities is to allow participants to gain self-insight. Balance facilitator input with participant involvement.

9. ALLOCATION OF TIME

- This depends on the number themes/units to be covered.
- Plan for at least one and half-hour per unit across seven units.
- Use your judgement on what is to be emphasised, based on the identified needs.
- Due to the richness of this module in terms of new content, plan to hold training over a day and half in order to create space for participants to engage with the new content and to engage also in practical exercises.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals in order to determine the impact of the training on actual behaviour change. Questionnaires will also be used.





11. 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. Keep in mind that in dealing with any subject, there are various philosophical orientations that can be adopted. This is what allows the module to make sense.

12. BROAD AIMS OF THE MODULE

The preface covers broad aims of the module. The materials are designed around OBE principles, and due to the specificity of the outcomes, these are covered at unit level.

To encourage the participants' involvement, commence by asking them what they expect to get out of the workshop and whether there are any additional outcomes that they would like to get out of it. Put these up on the flip chart. This will be useful for determining whether the workshop was successful overall.

13. DEALING WITH PARTICIPANTS' EXPECTATIONS THAT ARE NOT IN LINE WITH WHAT THE WORKSHOP IS MEANT TO COVER

- Receive participants' input without censoring it so as 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 listed expected outcomes for revisiting as part of the conclusion, when you will be checking whether participants feel that the outcomes were attained.

14. THE STRUCTURE OF FACILITATOR'S NOTES

The facilitator's manual highlights only those areas in the manual that deserve further elaboration. Your attention is drawn to the relevant sections of the manual. To operate efficiently it is suggested that you pay close attention to areas where the facilitator's input (J) is indicated in the manual.



UNIT 1:

UNDERSTANDING GROUPS (p. 2)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 2)

- Record the unit outcomes on a flipchart.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it.
- Keep this consistent across the unit.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit unit outcomes.

EXPLANATORY NOTES

- This module provides the foundation and is facilitator-driven.
- Go over the material given in the module and highlight the important points.
- Allow for questions seeking clarification.
- At the end of the module invite participants to do the practical exercise.

PRACTICAL EXERCISE (p. 2)

Given this definition, list the groups that you are involved in and indicate how the group influences you and vice versa.

These are merely examples that may be used if participants experience difficulty in doing the practical exercise.

TABLE 1

GROUP	HOW YOU INFLUENCE	HOW INFLUENCED
Tea club	Bring tea leaves	They bring milk and sugar
Lift club	Contribute petrol money	Give me a ride
Burial club, etc.	Pay subscription fee	Enjoy burial cover

FACILITATION PROCESS

- These are examples of possible answers.
- Do not open discussion on participant input that is obviously correct.
- Allow participants to briefly state their views in cases of disagreement.
- Once you feel the participants get the picture, i.e. after 4-6 correct examples, move on.
- Record participant input on the flip chart.
- Give the correct answer with a brief justification, and move on.



PRACTICAL EXERCISE (p. 3).

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 module, would you change your preference and why?

FACILITATION PROCESS

- Allow participants to write their answers in the training manual.
- This should be an individual exercise due to its sensitivity.
- Invite participants to share with the group, but only on a voluntary basis.
- Realise that different participants can say the same thing using different words.

TASK, RELATIONSHIP AND DYSFUNCTIONAL ROLES OF GROUPS

ROLE	RESPONSIBILITY
Task role (+)	INITIATING: <ul style="list-style-type: none">• Defining the problem• Suggesting activities• Assigning tasks
	INFORMATION SEEKING: <ul style="list-style-type: none">• Asking questions• Seeking relevant data or views
	SUMMARISING: <ul style="list-style-type: none">• Reviewing and integrating other points• Checking for common understanding and readiness for action
	EVALUATING: <ul style="list-style-type: none">• Assessing validity of assumptions• Quality of information• Reasonableness of recommendations
	GUIDING: <ul style="list-style-type: none">• Keep group on track
Relationship role (+)	HARMONISING: <ul style="list-style-type: none">• Resolving inter-personal conflicts, and reduced tension
	ENCOURAGING: <ul style="list-style-type: none">• Supporting and praising• Showing appreciation for contributions
	GATE KEEPING: <ul style="list-style-type: none">• Assuring even participation by all members• Eliminating domination of members



ROLE	RESPONSIBILITY
Dysfunctional role (-)	DOMINATING: <ul style="list-style-type: none">• Monopolising group time• Forcing views on others
	BLOCKING: <ul style="list-style-type: none">• Stubbornly obstructing and impeding group work• Persistent negativism
	ATTACKING: <ul style="list-style-type: none">• Belittling others• Creating a hostile or intimidating environment
	DISTRACTING: <ul style="list-style-type: none">• Engaging in irrelevant behaviour• Distracting others' attention

FACILITATOR'S INPUT (p. 4)

- Go through the material covered in the Training Manual.
- Explain the task and relationship roles.
- Make sure the participants understand these roles.
- Allow for clarity seeking questions.
- At the end, ask participants to go over the Task Relationship Table on page 4 of the Training Manual and to individually do the following:
 - i. Identify the roles they have played in groups.
 - ii. Determine whether those roles were productive or not.
 - iii. Highlight that: Honesty is the best policy!
 - iv. Invite participants to share other ways of maximising group performance.
- Invite participants to share other ways in which they can maximise group performance.





UNIT 2:

TEAMS (p. 7)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 7)

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it.
- Keep this consistent across the unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit unit outcomes.

DEVELOPMENTAL STAGES IN THE LIFE-CYCLE OF TEAMS (p. 7)

Managers must align their expectations of team outputs with the developmental stage of the team.

EXPLANATORY NOTES

Women managers who are preoccupied with proving their worth often run the risk of having unrealistic expectations of others and the teams they work with. What the stages on page 6 suggest is that whenever teams are put together, they need space and time to gel. The manager's expectations should be in line with the stage of development the team is at, as indicated in the life-cycle. For instance, it would be totally unrealistic to expect any team to produce a substantive proposal after one meeting.

PRACTICAL EXERCISE (p. 8)

Considering what you have learned about teams, think about teams that you are part of and evaluate them in the context of what worked and what did not work.

This is merely an example that you can refer to in order to clarify the nature of the task.



THE EXAMPLE BELOW IS BASED ON THE EXPERIENCES OF A MEMBER OF THE MASTER TIME-TABLE TEAM.

CHARACTERISTIC	CHARACTERISTIC	CHARACTERISTIC
Generate a master time-table for Grades 8-10 with no clashes both in terms of educators concerned and the utilisation of available facilities.	The team procrastinated and as a result produced a mess of a time-table with clashes that lasted for the entire term.	Allocate enough time, i.e. finalise the time-table of the following year before the schools close in the previous year.
Access to resources:	The team composition was not based on any expertise or experience. There were serious time constraints.	Draw a time-table team with members having adequate experience, members with a knack for detail; and schedule times for the team to actually sit down and do it within defined time frames.
Technical skills:	Attentiveness to detail was lacking.	Include Ms B, who is very attentive to detail.
Understanding operating rules:	Not defined and for a whole month it was not clear who the convener was.	Define roles and responsibilities up front.
Clear definition of tasks:	The magnitude of the task was not clearly understood by team members.	Define who is the convenor; who is to analyse staff allocation; who is to analyse the allocation of physical facilities, and how; and are all these bits and pieces of information going to be collated into a time-table.
Communication:	There was very poor communication about dates of subsequent meetings, which led to high rate of absenteeism.	Decide on the date and time of the next meeting at the previous meeting.
Quality requirements set:	Very poor quality product resulted.	Improve quality by aiming at a drastic reduction of double bookings!

In this example there was clearly a severe lack of balance in team roles.





UNIT 3:

TEAM FUNCTIONS (p. 9)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 9)

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it. .
- Keep this consistent across the unit
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

EXPLANATORY NOTE

FUNCTIONAL ROLES:

Roles we all know about, i.e.:

- Tasks listed in a job description
- Identified at interviews, based on skills, abilities and experience

TEAM ROLES (p. 9)

- Determined by our inherent personality and learned behaviour rather than skills, experience/ technical knowledge, e.g. we are slapdash/firm by nature.
- A team player/member is therefore likely to adopt the same team role in every team they work in.

Teams are necessary because of the opportunity they offer to complement each other's skills. Women are generally good at using people skills to accomplish a task. It is important for leaders in education to exploit the strengths of people that they work with, to the benefit and productivity of their teams. This is best accomplished by focussing on what people's abilities/skills are regardless of their level.



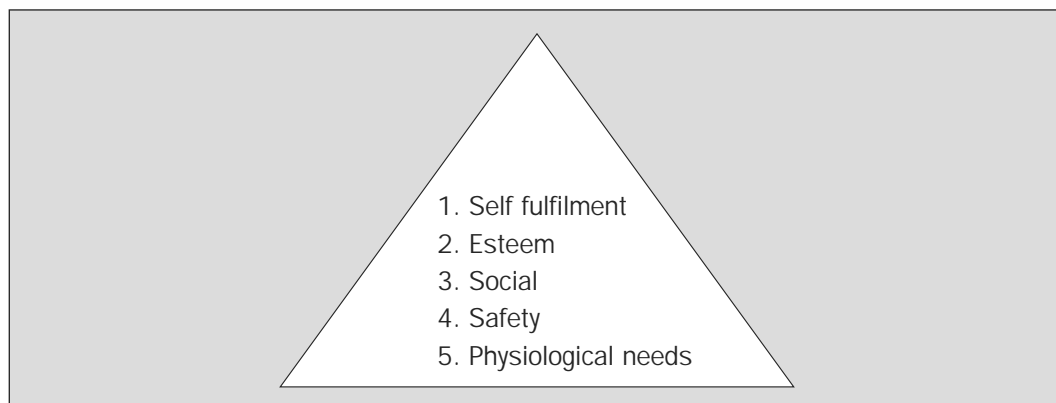
UNIT 4:

KEEPING TEAMS MOTIVATED (p. 12)

UNIT OUTCOMES: (p. 12)

- Record the unit outcomes for this unit on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it.
- Keep this consistent across the unit
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit unit outcomes

MASLOW'S HIERARCHY VERSUS TEAM MOTIVATION



EXPLANATORY NOTE

Recognise as a woman manager that different things motivate different people. Your challenge, as a manager, is to acknowledge this and to structure your reward system, such that it accommodates people with this diversity of motivational needs. Also take note of the fact that according to Maslow, lower level needs have to be met first before higher level needs can even emerge. Thus if your educators go without being paid for six months you cannot realistically expect them to move out of the level of the very basic physiological and shelter needs. As such they cannot give off their very best to their learners.

EXAMPLE: (p. 13)

(Use this example if you believe that further clarity is required)

At the lowest level would be people who are motivated to participate in task team activities because of the prospect of a free lunch.

People whose motivation is that the venue where the task team meets provides them with safety (e.g. physical or psychological safety) can represent the next level. An example of psychological safety is that of enjoying task team activities because they take the team members away from a hostile working environment.



- At the level of being motivated by social needs, a team member may work hard and participate in team activities because she enjoys the company of task team members. At the level of self-esteem and motivational needs, the member may view team membership as a sign of recognition for expertise etc.
- At the level of self-fulfilment, the task team member may contribute because she derives pleasure from contributing to what may be considered a good course.

The challenge for women managers is to identify who is motivated by what, to provide for those motivational needs in the task they are required to participate in, and to build the motivational needs into teamwork whenever possible.

EXAMPLES:

- People with a strong social need for recognition feel good about themselves when publicly acknowledged.
- People with a strong need for self-actualisation are self-motivated.
- People with strong self-esteem needs, see prestige and recognition by authority figures as important.



UNIT 5:

DEALING WITH PEOPLE PROBLEMS IN A TEAM (p. 16)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 16)

- Record unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it.
- Keep this consistent across the unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit unit outcomes.

FACILITATOR INPUT

Before you even begin to touch the team in analysing the problem, start with yourself: Ask yourself the following questions:

- Have I communicated the team expectations clearly?
- Does the team understand the task?
- How am I treating the team?
- Are my expectations of the team's output realistic?
- Have I provided the team with the resources they need to get on with the job?

Only after satisfying yourself that you are not the problem, can you begin to scrutinise the problems of the team!

(Pose the same question to the group you are facilitating.)

PRACTICAL EXERCISE (p. 17)

Suppose 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 less interest, participates minimally and misses deadlines. What do you think might be the cause?

FACILITATION PROCESS

- Allow participants to contribute their answers in the big group.
- Record input on the flipchart, and add whatever is left out.
- Correct misconceptions.
- Use examples given below to steer the discussion in the right direction.



EXAMPLES OF POSSIBLE PROBLEMS

POSSIBLE REASONS
1. Reward structure within the team not appropriate/unfair e.g. even after long hours of hard work, there is no appreciation for what the team goes through
2. Lack of recognition e.g. one person does all the work and the whole team takes credit.
3. Lack of clarity of team objectives e.g. the team does not fully understand what they are supposed to do and why. The team leader is not sufficiently sharing information.
4. Lack of commitment from other team members e.g. the project is viewed as an unnecessary additional burden
5. Unrealistic expectations of the team leader e.g. right from day one, the team leader expected tangible outputs and is not allowing the team to ease into the task, considering the various stages in team development

PRACTICAL EXERCISE (p. 18)

Look at the table below and discuss in what way that which is listed under "stress factor" can lead to negative stress. Also indicate how this negative stress can be avoided.

FACILITATION PROCESS

- Allow participants to contribute their answers in the big group.
- Record input on the flip chart and add whatever is left out.
- Correct misconceptions.
- Use examples given below to steer the discussion in the right direction.
- If no contributions are forthcoming from the group, use the examples provided on the next page to start the discussion.
- If clarity on stress factors is required, use the examples provided in the following table:



EXAMPLES:

STRESS FACTOR	PROPOSED SOLUTION
Deadlines , e.g. Unreasonable deadline.	The convenor should approach the project sponsor/ custodian with a clear rationale and concrete proposal and renegotiate the deadlines.
Interruptions , e.g. Not having a quiet, isolated venue where the project team can get on with its business.	Choose a relatively quiet time, e.g. when learners are in class.
Poor performance Some team members not pulling their weight.	Address the issue of roles and responsibilities and the effect thereof on the team's productivity.
Long hours , e.g. Stringent deadline for the team to meet for 2 hours after school five days a week.	Plan in advance and schedule after-school activities for no more than twice a week next time.
Heavy work load Task team members involved in too many other activities in addition to their functional roles.	Raise this in an appropriate forum. Empower other staff members to take more responsibility by training them.
Poor prioritising , e.g. The principal keeps giving team members other responsibilities.	Generate a list of all current projects/ activities. Approach the principal and politely ask him/her to give an indication of order of importance of the listed activities with time frames. Also request that no additional activities be assigned in the meantime.
Isolated working conditions , e.g. Due to the isolation of the school and crime in the neighbourhood, team members feel unsafe working after hours.	Discuss with the project team and determine if an alternative venue, e.g. city library cannot be used.
Bad working relations The team is falling apart because of personality clashes	If relationships are bad to the point of rendering the team dysfunctional, approach the project sponsor/ custodian and ask him /her to disband the team and constitute a new one.
Insecurity/fear of redundancy The outcome of the team exercise has possible implications for redeployment, hence task team members are careful not to dig their own graves.	Do not appoint into the team people who may have a vested interest. Neutrality in relation to the issue being handled is crucial.
Organisational politics There is an unwritten rule in this school that you dare not counter what the principal suggests. This is holding the task team back and members are careful not to cross the line.	Approach the custodian/ sponsor of the project and talk about this. In the team itself acknowledge that all team members are of equal status and hold all team members accountable for behaving in a manner that is line with the principle of equality.



UNIT 5:

PROBLEM PEOPLE *(p. 18)*

FACILITATOR'S INPUT

UNIT OUTCOMES *(p. 18)*

- Record unit outcomes captured on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Ask participants if there are outcomes that they can link with this unit.
- Record participant input without censoring it.
- Keep this consistent across the unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

EXPLANATORY NOTE

Explain the difference between people problems and problem people.

PEOPLE PROBLEMS: are problems that emanate from bringing people of different styles and approaches together, or are at times caused by human errors of omission, which can be rectified once, recognised (e.g. not agreeing on what is priority).

PROBLEM PEOPLE: are people whose “modus operandi” presents a problem for people they have to interact with. Problem people have deep-seated issues that make it difficult for such people to work harmoniously with others (e.g. a team member who opposes authority as matter of personal style).

FACILITATION PROCESS

- Familiarise yourself with the material covered on pages 18-23 of the Training Manual.
- Explain the different personality types.
- Refer to possible the impact of the styles of these personality types on team dynamics and productivity.
- Allow for clarity seeking questions.
- Ask the participants at the end to identify a personality type that best describes them. (Do not ask them to share this).
- Present the role-play and practical exercises on pages 21 and 23.
- Divide the participants into two groups. (Ideally each group should have only five people).
- Assign one exercise to each group, to do over seven minutes.
- Allow for a report back session (allow for five minutes).



ROLE -PLAY (p. 21)

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. The person in question, however, insists on external facilitation. You have neither the time nor the budget. How are you going to handle this situation?

ROLES:

- The group becomes a forum in which this discussion takes place.
- One team member advocating for external facilitation - argue your point.
- one team member volunteering to take the responsibility - argue your point.
- The rest of the participants give constructive feedback to the process.

POSSIBLE ARGUMENTS FOR EXTERNAL	POSSIBLE ARGUMENTS FOR INTERNAL
Objectivity	Perceived Expertise
Perceived expertise	Understanding of the context
Familiarity with what happens elsewhere	Free
	No budget

PRACTICAL EXERCISE

In the teams you have worked in, what personality types were represented, and what was the impact of these types on team productivity.

If groups experience problems, use examples provided below to facilitate the process.



EXAMPLES OF PERSONALITIES AND THE IMPACT THEY HAVE IN TEAMS:

PERSONALITY TYPE	IMPACT ON TEAM PRODUCTIVITY
The domineering person	Unassertive team members may decide to withdraw and this may end up being a sole activity, which is bound to affect the quality of output.
The over-competitive person	Wants to get credit and may hoard and withhold information in order to appear better than the team.
The prima donna	Not interested in the team and is preoccupied with self-interest. Can be a stumbling block if team interests are not in line with own interest.
The control freak	Wants to control everything and wants to be in charge. Takes over if the team leader is not attentive. If the control freak is the team leader, the team productivity may be severely constrained by his/her overly prescriptive style.
The rule bender	Can end up making the team deviate from its brief, and needs to be kept in balance.



UNIT 7:

KEEPING TEAMS WORKING TOGETHER (p. 24)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 24)

- Record unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

FACILITATOR'S INPUT

Most women managers inherit teams that are not balanced. What can you do? Various options are available to you. Applying one or more of these techniques may prove helpful in your attempt to achieve your goals despite the lack of balance in your team. The following tips may be helpful:

- Think before you leap, i.e. when you join a team for the first time sit back and observe the dynamics.
- Identify the real issues and not the symptom of the underlying issues.
- Look on the bright side of things. Maybe that team member who is going on and on about what is wrong in the team has a point.
- Focus the team on the team objectives.
- Reward the team for a job well done, e.g. after submitting a quality document on time offer the team some time off, such as half a day).
- Recognise those individuals within the team who go the extra mile.

SELF - TEST (p. 25)

What is your own contribution as a woman manager to team dynamics?
Teamwork is a question of synergy that comes about as result of complementary roles. Have you ever taken the trouble to analyse what you bring into a team? If not, this is the opportunity to do so.



MY OWN PERSONALITY TYPE	IMPACT ON TEAM PRODUCTIVITY	WHAT I WILL DO TO OVERCOME THIS

- This is an individual exercise.
- Go over the material covered on pages 18-23 of your Training Manual.
- Identify personality characteristics that describe you.
- Write down the impact of these characteristics on team productivity.
- Generate a list of concrete actions that you will take to overcome the destructive ones.
- Highlight the point that: Stick to your Action Plan and Review every six months!

15. 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.

16. CONCLUSION: WERE THE WORKSHOP OUTCOMES ATTAINED?

- Re-visit 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.



T

able of contents

1. Background to the module	2
2. Pre-workshop[diagnosis	2
3. Practical considerations	2
4. Practical activities	3
5. Before you begin	3
6. Dealing with unit outcomes	3
7. Suggested time frames	3
8. Practical exercises	3
9. Allocation of time	4
10. Follow-up activities	4
11. Underlying assumptions	4
12. Background to the module	5
Unit 1: Understanding Meetings	5
Unit 2: Preparing for a meeting	7
Unit 3: Conducting meetings	9
Unit 4: Impromptu meetings	11
13. Workshop evaluation	13
14. Conclusion	13





FACILITATOR'S GUIDES: CONDUCTING EFFECTIVE MEETINGS

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that the training manual is designed to be both a training manual and a resource book for women managers on their own who may need to sharpen their skills at organising or chairing or facilitating decision making within the context of meetings. Hence, in preparation for conducting workshops, it becomes important that a needs analysis be conducted to determine what is to be covered in the workshop and to what extent.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any form of training in the conducting of meetings may need the entire training module. Unless the training workshop extends over a day and a half, it may not be possible to cover everything in depth.
- Select themes to be covered from the manual according to identified needs.
- Also decide on the degree of emphasis according to the data gathered.
- Because the modules are in the OBE format it also becomes important that time be set aside for practical exercises to determine whether unit outcomes have been reached.
- At the end of the whole module participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

Facilitator should bring the following reference materials:

- Samples of minutes.
- Samples of agendas and notification for meetings. Training Module on the Conducting of Productive Meetings.

Build into the training session, sessions for practical role-playing and case studies to give participants an opportunity to interact with the material at a deeper level.

Stationery:

- 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

For personal development-type training interventions like this one, it is ideal to keep the numbers small, i.e. 25 at most in order to create space for interaction with the group as well as self-analysis. Also, a lot of role-playing is desirable for this module.

4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and be able to apply knowledge gained in practical situations. Role-play is the key practical activity that will be used in this module, the reason being that the participants will need to put into practice the theoretical information they acquire. This makes practical activities a vital part of the training. Furthermore, the practice of requiring participants to role-play also offers them an opportunity to polish their public speaking and communication skills, since being a chairperson requires that you express yourself well above the ordinary.

THE ROLE OF OBSERVERS

In role-playing sessions, the participants who are not actively participating will observe the proceedings and give constructive feedback to the role players.

5. BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to equip the participants with the art of public speaking, also creating a platform from which participants can gain insight into their own counterproductive ways of conducting meetings, and hopefully improve on them.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit highlight the unit outcomes, and before you move to the next unit check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

The least amount of time one can get by with in this module is three hours. This is premised on the notion that the participants are reasonably experienced in conducting meetings and that the workshop will be merely for fine-tuning their skills. As such, the workshop will not cover everything. In cases where everything is to be covered due to the lack of experience of participants in conducting meetings, at least half a day will be needed.

8. EXERCISES

The nature of this module calls for a sizable group involvement in doing practical exercises and sharing with the big group. The purpose of these activities is to allow participants to gain practical experience in conducting effective meetings within the secure training environment. This hopefully will be a starting point from which they begin to develop a habit of organising and chairing meetings properly. The practical exercises further serve to balance facilitator input with participant involvement.





9. ALLOCATION OF TIME

- This depends on the themes/ units to be covered.
- Plan for at least 60 minutes per unit across 3 units.
- Use your judgment on what is to be emphasised, based on the identified needs.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of training on actual behaviour change, and to determine the impact of the training received.

11. UNDERLYING ASSUMPTIONS

The whole module is premised on the notion that women can conduct effective meetings only if they are:

- Aware of the different types and dynamics within meetings they chair .
- Aware of what makes them less effective as chairpersons.
- Aware of what they need to improve on.
- Aware that it is important to be assertive if you are to chair meetings successfully.
- Ready to make an ongoing concerted effort to improve their leadership skills in handling meetings.

12. BACKGROUND TO THE MODULE

It is important that as a facilitator, you recognise that the training manual is designed to be both a training manual and a resource book for women managers on their own who may need to sharpen their skills in conducting effective meetings. Hence for workshop purposes it is important that themes to cover, as well as the degree of emphasis, be determined according to the pre-workshop diagnosis data. For workshop purposes it will thus be futile to try to answer/cover everything.

13. THE STRUCTURE OF FACILITATOR'S NOTES

The facilitator's manual highlights only those areas in the manual that deserve further elaboration. Your attention is drawn to the relevant sections of the manual. To operate efficiently it is suggested that you pay close attention to areas where the facilitator's input is indicated in the manual.

- This is one of the most important modules, since we spend a lot of time in meetings.
- Meetings determine our planning strategies, our implementation of activities and the objectives, goals and vision /mission we have set for ourselves.
- Meetings take various shapes and there are many types of meetings; formal and informal, large and very small meetings, e.g. the one to one type of meeting which can put you on the spot and for which preparation thus becomes very important.
- Some people call meetings simply for the sake of calling meetings or just because it makes them feel important, without thinking of the purpose and importance of the meeting.
- Some meetings are routine, e.g. monthly meetings, staff meetings, coordinating meetings or meetings requiring constant follow-up; or meetings where the life span of the project is very short and thus follow-up is required at short intervals. Others still have to be conducted as a result of legal requirements, e.g. statutory meetings.



UNIT 1:

UNDERSTANDING MEETINGS *(p. 1)*

FACILITATOR'S INPUT

UNIT OUTCOMES *(p. 1)*

- Record the unit outcomes in a flipchart
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit
- Before concluding the unit, revisit the outcomes

DEFINITION OF TERMS *(p. 1)*

EXPLANATORY NOTE

Meetings are “the coming together of a number of persons at a certain time and place for a discussion or for a purpose”. There has to be a purpose for a meeting, failing which other means, less demanding, costly and time-consuming for addressing the situation at hand should be explored. For example, the use of the e-mail, fax, SMS etc that cost much less than even a telephone call, could be explored if the collaboration of minds is not necessarily a requirement for addressing the situation at hand.

WHY DO WE CALL MEETINGS *(pp. 1-2)*

- To share information
- To plan for the future, review progress
- To make decisions
- To solve problems

FACILITATOR'S NOTES

It is important for a person calling for a meeting to determine exactly whether the calling of the meeting/ collaboration of minds will enrich the outcome and in what way. In today's world, there are many ways of communicating, which makes calling a meeting really unnecessary, because even the collaboration of minds by means of people converging at one place has become unnecessary with the advent of modern technology.

FACILITATION PROCESS

Explore with the group the ways in which modern technology have made it easy for people to share and debate issues without being in one place. (Explain the terms: virtual meetings, teleconferencing, video conferencing etc.)

Emphasise the importance of checking that technology exists to make these alternatives to physical meetings possible.

- Discuss the differences between the mandatory and non-mandatory types, and virtual and conventional meetings.
- Find out from the participants which they would prefer, and why?





- Ask the participants what other meetings they feel should be added to the list of meetings discussed so far.
 - List three mandatory meetings that are prescribed by the SASA.
 - List three meetings that are not mandatory but which SMT needs to call from time to time.
- Divide participants into two groups.
- Let one group deal with mandatory meetings while the other group deals with non-mandatory meetings.
- Focus the attention of the groups on the following:
 - Who co-ordinates these in their school/department?
 - Who chairs them?
 - What leadership qualities does the person who chairs these meetings display?
 - What typical issues are dealt with at these meetings?

EXERCISE (p.2)

In the education establishment identify meetings that are of a statutory nature. List such meetings and indicate who the participants for each one should be. State also state the rules applicable for reaching a quorum.

FACILITATION PROCESS

Before presenting the information, ask participants to answer the questions above Record their input and augment the participant's input by referring to the text.

Dealing with Tips on handling negotiation meetings (p.5)

EXPLANATORY NOTES

Emphasise that what sets negotiation meetings apart from the rest is the approach. While in other meetings the need to inform the members may be primary, there is a need to make all the negotiating parties feel that they are equally responsible for the process and the outcome. The chairing of a negotiating meeting becomes tricky because the steering of a meeting should happen without the other party feeling dominated.

Emphasise the tips because following these tips can enhance the woman manager's ability to negotiate in good faith.

Other considerations are whether the area where the meeting is to take place is in an area accessible by public transport/safe venue where issues like safety, the availability of public transport, etc, may pose a problem.



UNIT 1:

PREPARING FOR A MEETING (p. 6)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 6)

- Record the unit outcomes captured in the module.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.

EXPLANATORY NOTE

It is important that the length of time spent on preparing for meetings is highlighted. This is to make sure that participants understand that there is a lot of groundwork that needs to take place before meetings are called.

- Each of the topics dealt with in this unit should be dealt with in detail.
- It is advisable that as much time as possible be allocated to this section of the discussion.
- Follow up each topic with a practical exercise.
- Divide the group in two to discuss first on their own as to what they think should go into each topic and then ask them to share this with the bigger group.
- Before you call a meeting ask yourself the following questions:
 - Why should I call a physical meeting?
 - Can I achieve the same purpose by other means?
 - Can I concretise (state clearly what needs to be dealt with in an agenda?
 - Will this meeting achieve a purpose that has not been achieved before and cannot be achieved by other means?

If you have any doubt about any of these questions, stop! Do not call a meeting; maybe you can achieve the same purpose by other means.

The role of a chairperson should be given prominence with the following points emphasised.

PRACTICAL EXERCISE:

Recall meetings that you have been part of and think about whether you feel:

- There was a need for the meeting
- The outcome would have been achieved via other means
- The meeting of the minds enhanced the final outcome
- The meeting was steered in a manner that led to the achievement of set objective.

If the same meeting was to be held again, what would need to be done differently?

Go Over the materials covered in pages 8-10 posing to ask questions to test the participant's understanding, and also encouraging the participants to ask questions. In instances where questions have been asked, refer the question to the group, and only provide answers in cases where the group cannot answer the questions.





PREPARING AGENDAS (p.10)

FACILITATION PROCESS

It has been repeated time and again that agendas are very important; hence they should be given the time and attention they deserve. Spend time discussing agendas, highlighting in the process the characteristics of good agendas - precise, in point form, and containing all the necessary information about the meeting. Various agendas for past meetings could be brought along to the plenary session, in order to analyse and pinpoint the shortcomings of each.

The participants should be made aware of notification period requirements - the mandatory seven days for the parents' meetings etc and a sufficiently long period for policy and decision making types of meetings.

Depending on the type of character that the chairperson wants to portray at the meeting, the seating style should reflect that - head of the table if you want to be dictatorial, round table if you want to enlist participation etc.

EXERCISE (p.11)

- | |
|--|
| • Draft up an agenda of the next management meeting |
| • 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. |
| • Does the agenda you have drafted comply with these? |

FACILITATION PROCESS

Let each participant draw up an agenda for a meeting of his/her choice. After that lead a group discussion on the points on the importance of an agenda, what would happen if a meeting was held without an agenda, as well as the question of two important characteristics of a good agenda.

HANDLING TIPS ON CONDUCTING STAFF MEETING

Ask the participants what they think should happen for staff meetings to be productive and less stressful for woman managers. After receiving input, cover points that have not been covered by referring to the tips



UNIT 3:

CONDUCTING A MEETINGS *(p. 12)*

FACILITATOR'S INPUT

UNIT OUTCOMES *(12)*

- Record the unit outcomes of this module on a flipchart
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit the outcomes

FACILITATION PROCESS

- Ask participants to indicate what they deem to be the role of the chairperson of a meeting.
- List the input uncensored at first.
- Revisit the list, seeking group consensus.
- Ask probing questions relating to important functions of the chairperson, not covered by the group.

THE LIST OF THE PARTICIPANTS' INPUT SHOULD INCORPORATE THE FOLLOWING:
• Solicit agenda items
• Convene the meeting
• Chair the meeting
• Follow up on resolutions
• Decide on the date of the next meeting
NOTE THAT THIS IS FURTHER DEFINED BY LAW FOR MANDATORY MEETINGS

In order for the chairperson to fulfil his/her obligations, what should he/she do?

FACILITATION PROCESS

- Ask participants to indicate what they deem to be the role of the chairperson of a meeting.
- List the input uncensored at first.
- Revisit the list seeking group consensus.
- Ask probing questions relating to important functions of the chairperson, not covered by the group.





THE LIST OF PARTICIPANTS' INPUT SHOULD INCLUDE THE FOLLOWING AMONG OTHER THINGS:

- The importance of preparedness on the part of the chairperson before she goes to meetings.
- Decisiveness.
- Exercise the prerogative of being the chairperson when necessary.
- Protect participants from domineering characters.
- The importance of encouraging participation at meetings.
- Impartiality on the part of the chairperson.
- Being a good listener.
- Flexibility.
- Having and exercising the authority of being a chairperson.
- Summarising the decisions taken.
- Being able to keep within the agreed time frames.

The chairperson must be very decisive, especially when it comes to issues like controlling the meeting, where various characters will want, for example, to dominate meetings, use abusive language etc.

(Refer to the *Team Building* module on how to deal with various characters and things to avoid on page 12 of this module.)

ROLE-PLAY (p. 14)

FACILITATION PROCESS

- Divide the participants into two groups, i.e. one group of people who participate in meetings on an ongoing basis and those who rarely participate in meetings.
- The group that participates regularly forms an observer group.
- The group which does not regularly participate must role-play a meeting:
 - Select a chairperson
 - Decide on the agenda
 - Conduct the meeting
 - Take minutes
 - Observe all the rules of the meeting
- The observer group observes proceedings and gives participants involved in role-play constructive feedback.
- Facilitator sums up feedback given.



UNIT 4:

IMPROMPTU MEETINGS (p.13)

FACILITATOR'S INPUT

UNIT OUTCOMES (p.13)

- Look at the unit outcomes and see if they cover the scope of the unit. Go further as to suggest which outcomes would be best suited for this unit.
- The purpose here is mainly to test the understanding of the participants of the difference between a planned and unplanned meeting, what the requirements of each are and what the different procedures to follow are.
- Highlight expectations that relate to the unit.

FACILITATION PROCESS

A grid is provided below for the group to list the similarities and differences between a planned and unplanned meeting. It would be useful to pick up a situation and ask the participants to explain whether a meeting taking place under those circumstances is likely to be a planned or unplanned one, e.g. the school suddenly catches fire; the matric results have been announced; the inter-varsity sports that will take place in two months' time, etc.

SIMILARITIES AND DIFFERENCES BETWEEN PLANNED AND IMPROMPTU MEETINGS	
SIMILARITIES	DIFFERENCES

- Invite the group to list the difference between this type of meeting and a planned meeting.
- What would be done differently and why?
- List these on the flip chart uncensored as the group mentions them.
- It is important that all or most of the procedures that would be followed for a planned meeting are also followed for an unplanned meeting. The difference lies in the level of preparation for the meeting.



CASE STUDY (p. 15)

The Representative Body of learner requires an urgent meeting with you to discuss the learner safety issue. A learner was attacked by gangsters on the school premises and had his cellular phone forcefully taken. Outline:

- Steps that you would take to deal with this request for an impromptu meeting.
- Desired outcome
- Who else you would involve and why
- What policy issues need to be brought to bear on this meeting

POSSIBLE ANSWERS:

Steps to be taken

Ascertain availability of key role players i.e. SGB chairperson and coordinator of school safety project at the school as well as representation from local police station/ Community Policing Forum

Convene this meeting at short notice

Desired outcome

Strategies to improve safety at school

Who else do you need to involve

Deputy principals/ HoD s as well as other educators- school safety is everybody's business

PRACTICAL EXERCISE (p. 14)

Invite participants who served as observers in the previous exercise to serve as role-players in conducting an impromptu meeting.

Identify the chairperson.

The topic of discussion.

Convene the meeting.

Find a venue.

Run a productive meeting that leads to resolutions being taken despite a lack of preparation

- The other group serves as observers and gives constructive feedback at the end.
- The facilitator sums up feedback and adds whatever needs to be added.



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 and expectations were written.

- Go over the outcomes one by one
- Ascertain whether the participants believe the outcomes were achieved.
- Reminding the group of any follow-up actions and time frames if any were agreed upon.
- If most of the outcomes were achieved, well done, and congratulate the group if this is the case.
- If most of the outcomes were not achieved, you as a facilitator need to practice steering the ship in the right direction with whatever follow-up actions/activities you deem necessary.
- Any information relating to the hosts about the venue should be communicated to them, as this will help them improve/appreciate what they provide.
- Include this in the process report.

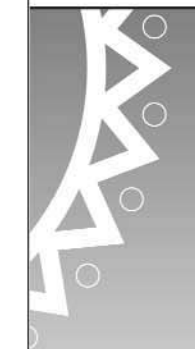




Table of contents

1. Background to the module	2
2. Pre-workshop diagnosis	2
3. Practical considerations	2
4. Practical activities	4
5. Before you begin	4
6. Dealing with unit outcomes	4
7. Suggested time frames	4
8. Exercises	5
9. Allocation of time	5
10. Follow-up activities	5
SECTION A:	
Unit 1: Understanding recruitment in relation to selections	6
Unit 2: Measurement of behavioural attributes	10
Unit 3: Before selection	12
Unit 4: Preparation before the selection interview	13
Unit 5: Administrative responsibilities before the interview	14
Unit 6: Getting the selection panel prepared.	15
Unit 7: Pre-preparation of women managers	17
Unit 8: Preparation of women managers	19
SECTION B:	
Unit 9: Building an attractive CV	21
Unit 10: Writing a covering letter	25
SECTION C:	
You have secured an interview – now what?	26
14. Conclusion	28
12. The way forward	29



FACILITATOR'S NOTES: FOR THE RECRUITMENT AND SELECTION MODULE

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that this module is designed to cover recruitment and selection from the perspective of a woman manager serving as an interviewer, as well as from the perspective of an interviewee. The covering of both perspectives is premised on the notion that the module should assist women managers to perform well in interviews so that they can advance in their careers, while also equipping them with the skills they need to recruit and select appropriately. Pre-workshop diagnosis is even more important in this module as it will help determine the main areas of workshop focus.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any form of training in recruitment and selection may need the entire training module. Unless the training workshop extends over two days it may not be possible to cover everything in depth.
- Select themes to be covered from the manual according to the identified needs.
- Also decide on the degree of emphasis according to the identified needs.
- It is important for the facilitator to realise that what needs to be covered in the individual workshop and the detail thereof should be carefully selected, based on the identified needs coming out of the pre-workshop diagnosis.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and that you should try to clarify your own understanding of the content before the workshop.
- Because the modules are in the OBE format, it also becomes important that time be set aside for practical exercises to determine whether unit outcomes have been reached.
- At the end of the whole module participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

To make the workshop practical, informative and interactive bring with you:

Advertisements of positions published within the past 12 months for the following positions:

- Senior management
- Middle management
- Professional-type positions
- Administrative positions



FAMILIARISE YOURSELF WITH EXCERPTS ATTACHED AS ANNEXURES TO THE WOMEN AND THE LAW MODULE FROM THE FOLLOWING PIECES OF LEGISLATION:

THE CONSTITUTION

Constitutional Rights

Constitution Chapter 2 Sections 8, 9,10, 14,15, 16, 17 &18

BASIC CONDITIONS OF EMPLOYMENT ACT

Chapter 4 Section 29

EMPLOYMENT OF EDUCATOR'S ACT

Entire Act

LABOUR RELATIONS ACT NO. 66 OF 1995 AS AMENDED

Chapter 2 Sections 4,5,6,7 & 8

EMPLOYMENT EQUITY ACT

Chapter 1 Sections 5,6,7,8 & 9

Public Service Act Sections 9, 10, 11, 12, & 13

STATIONERY

- Paper and pens
- Flipcharts
- Marking pens (different colours)
- Prestik/ Tape/Pins

PARTICIPANTS TO BRING

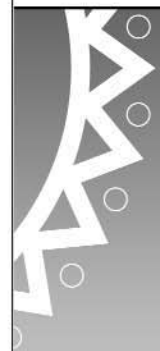
- A copy of own CV
- Copies of their own covering letters they have written
- Advertisements for positions advertised in the past 12 months

SEATING ARRANGEMENT

A round table-type of arrangement or a boardroom-type of arrangement with movable furniture components for small panel sessions is desirable.

NUMBER OF PARTICIPANTS

For personal development training interventions like this one, it is ideal to keep the numbers small, i.e. 15 at most, in order to create space for interaction with the group.





4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. This makes practical activities a vital part of training. Furthermore, the practice of requiring participants to report back also offers them an opportunity to polish their public speaking and communication skills.

Role-playing is the key practical activity that will be used in this module, the reason being that the participants will need to put into practice the theoretical information they acquire. For interviewing role-play, compose the panel according to departmental specifications. For maximum cooperation, first give the participants an opportunity to choose the roles they want to play. It is helpful to encourage those participants who have not played a role before to try it in the security of a workshop. Participants who commonly play a role also benefit, but the practice sessions are often most valuable to those participants who have not played a role before, e.g. chairing a selection panel; serving as a subject expert, etc.

THE ROLE OF OBSERVERS

The rest of the participants observe the proceedings and give constructive feedback to the panel and the candidate. It is important that the facilitator makes sure that the roles are reversed in various exercises such that all participants get a chance to play different roles.

5. BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to offer the participants an opportunity to practice being an interviewer as well as an interviewee. Depending on the number of participants involved, determine in advance how many practice sessions you are going to allow:

OPTION 1: Allow practice sessions as you move along.

OPTION 2: Allow one practice session that seeks to integrate all the different sections.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit and before you move to the next unit – highlight the unit outcomes. Check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

The least amount of time one can get by with is one day for the whole module. This is premised on the notion that the facilitator is able to select the themes that best address the needs of most participants, and therefore will not cover everything. In cases where everything is to be covered, at least two full days will be needed if the intervention is to be both informative and interactive.



8. EXERCISES

The nature of this module calls for group involvement in doing practical exercises and while voluntary participation in group activities is ideal, participants who do not voluntarily participate should be encouraged to participate. The purpose of these activities is to allow participants to test whether they have interpreted the information correctly and to apply the information they have acquired.

The module is heavily loaded with content, most of which should be covered to achieve the module outcomes. Hence the presentation format should be heavily facilitator-driven, with opportunities afforded to participants to put questions for clarification.

Participant involvement is promoted via role-play.

9. ALLOCATION OF TIME

- This depends on the themes/units to be covered.
- Plan for at least three hours per section, selecting from three sections on the basis of the pre-workshop diagnosis.
- Use your judgment on what is to be emphasised, based on the identified needs.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of training on actual behaviour change. The exact nature thereof will be explained as part of the conclusion.





SECTION A: THE WOMAN MANAGER AS AN INTERVIEWER

Explain to the participants that the focus of section A is to equip women managers with skills, attitudes and habits that will allow them to engage in recruitment and selection activities with confidence.

UNIT 1:

UNDERSTANDING RECRUITMENT IN RELATION TO SELECTION.

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit revisit the unit outcomes

TABLE 1: UNDERSTANDING RECRUITMENT IN RELATION TO SELECTION (p. 2)

Ask participants to do the exercise on **page 3** on "Understanding recruitment versus Selection" before you explain the material covered on **page 2**.

Classify the following activities as either recruitment or selection activities.

Answers to Exercise on **page 3**.

RECRUITMENT	SELECTION
Negotiation of selection of new selection criteria for appointment of educators. (SELECTION)	Deciding on the roles and responsibilities of the different panel members. (SELECTION)
Receiving and recording of received applications for a vacant position. (SELECTION)	Deciding on the sequencing of candidates. (SELECTION)
Putting together of a selection committee to conduct interviews. (SELECTION)	Deciding on the sequencing of questions. (SELECTION)
Deciding on the medium to be used for advertising vacant posts. (RECRUITMENT)	Deciding on who will chair the selection panel. (SELECTION)
Deciding on the composition of a selection panel. (SELECTION)	Procedure to be followed to communicate the results of interviews to the appropriate departmental office. (RECRUITMENT)



RULE OF THUMB

Anything that is a policy matter regulated by the DOE Policy/ Employment of Educator's Act/ and HRM Resolutions is a policy/legislative matter and falls under the umbrella of Recruitment. This is highly regulated and there is no room for any deviation from such policy/ legal provisions.

Application of all the legal/policy provisions in filling a particular post becomes selection.
Legal considerations in recruitment and selection (pp. 4-6)

THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA

REFER TO:

THE CONSTITUTIONAL RIGHTS

Constitution Chapter 2 Sections 8, 9,10, 14,15 16, 17 &18.

Participants should know these constitutional provisions- Invite the participants to share these - and fill whatever gaps may exist.

APPLICATION OF THE EMPLOYMENT EQUITY ACT

Job applicants must meet the necessary requirements for the job.

Beware of nepotism and jobs for pals disguised as application of the EEA.

An indication needs to be given which positions are EEA via some resolutions/policy decisions.

Be careful that the advertisements are worded in a manner that does not constitute an absolute barrier to non-designated employees.

BASIC CONDITIONS OF EMPLOYMENT ACT

Chapter 4 Section 29

The relevance of the BCEA for recruitment purposes comes at the stage of making an employment offer. It is crucial that letters of appointment comply with Section 29.

Since this is the tail end of the process, mention it in passing.

EMPLOYMENT OF EDUCATORS ACT

ENTIRE ACT

- Educators specifically must be fully conversant with this Act.
- Deal with the employment of non-educators working for the DoE under the relevant policy provisions.

RECRUITMENT AND THE LRA

REFER TO:

Chapter 2 Sections 4,5, 6,7, & 8

Since the training manual explains this in detail, mention this and delve deeper only in the context of questions for the sake of clarification.





PRACTICAL EXAMPLES (p. 7):

IN THE FOLLOWING EXAMPLES, IDENTIFY THE LAW THAT IS BEING VIOLATED/NOT PROPERLY APPLIED:

1. The chairperson of the governing body dominates the interview and at the end tells one of the candidates that he/she is hired.

This favours a particular candidate at the expense of other candidates and it further trivializes the role of other panel members. The constitutional right to fairness is particularly violated. There seems to be a violation of other candidates' rights to fair and non-discriminatory selection procedures, especially those candidates who will come after the "hired" one.

There is also a violation of the constitutional rights of other panel members, e.g. freedom of expression.

2. A white male is asked why he bothered to apply because the vacant position is to be filled by a black candidate.

The EEA specifically prohibits presenting absolute barriers to white males. Furthermore the information about the EE status of a vacant position should be conveyed in an advert. Hence this violates the candidate's right to dignity and also, he is unfairly discriminated against. Here it is not the exclusion of white males per se that is discriminatory and a violation of the right to dignity, but rather the way in which it is done.

3. 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.

This is blatant unfair discrimination that amounts to the violation of the Constitutional right of other candidates not to be unfairly discriminated against. It is also a violation of the Employment Equity Act.

4. The chairperson of the selection committee/interviewing panel tells one candidate that her track record speaks for itself and interviewing her is just a formality.

This is blatant unfair discrimination that amounts to the violation of the constitutional right of other candidates not to be unfairly discriminated against. It is also a violation of the Employment Equity Act. The fact that the chairperson has made up his/her mind before interviewing this candidate violates the other candidates' right to fair selection procedures.

5. The principal tells the candidate that she has been hired and decides that to catch up she can start working before she receives an official letter of appointment informing her of her recommendation by the selection panel.

This is a blatant violation of Section 29 of the BCEA.



Practical example (p.7) *continued...*

6. The principal conducts the interviews alone and tells the SGB that it was urgent that the interviews be held.

This is a blatant violation of the Employment of Educators Act.

7. The principal asks a principal of the previous school about a candidate who has not indicated the previous principal as one of the referees.

This is a violation of the Labour Relations Act/ Employment Equity Act.

8. The chairperson of a SGB declines to recommend an otherwise good candidate because of the rumour that he is HIV-positive.

This is a violation of the constitutional right not to be discriminated against. It is also a violation of the right to non-discrimination as provided for by the Employment Equity Act.

9. One of the panel members asks a candidate about his medical history in the interview.

This is a violation of the constitutional right not to be discriminated against. It is also a violation of the right to non-discrimination as provided for by the Employment Equity Act.





UNIT 2:

MEASUREMENT OF BEHAVIOURAL ATTRIBUTES AS A MECHANISM TO PROMOTE FAIRNESS IN RECRUITMENT AND SELECTION *(p. 7)*

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Before you conclude the unit, revisit the outcomes.

Highlight those outcomes that relate to the module.

Go over the material covered on pages 4–7, emphasising the implications for Recruitment and Selection.

Examples on page 8

FACILITATION PROCESS

- First receive input without censoring.
- Record on the flip chart.
- Allow no further discussion of the correct answers.
- Allow brief discussion of incorrect answers, highlighting why they are incorrect, and invite participants to give alternative answers.

Go over the material covered on pages 8-9.

Make sure the participants understand the format of the Measuring of Behavioural Attributes as an Interviewing Technique.



PRACTICAL EXERCISE (p. 8):

ANSWER THE FOLLOWING QUESTIONS, WHICH ARE IN A FORMAT THAT SEEKS TO MEASURE BEHAVIOURAL ATTRIBUTES.

1. 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.
2. 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.
3. 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?
4. 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?
5. 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.
6. Have you encountered a situation where a male subordinate undermined your authority, what was the situation, how did you deal with it and what was the result of your actions?



UNIT 3:

BEFORE SELECTION (p. 9)

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on the flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.

FACILITATION PROCESS

Participants should bring to the workshop examples of the advertisements of their respective provincial departments that will be analysed for compliance with the above criteria.

Using the advertisement provided by the facilitator, the participants scrutinise the adequacy of the advertisements by determining whether they comply with the following:

- Spell out the minimum requirement in terms of formal qualifications and certification by a professional body.
- State the minimum experience required in terms of both quality and quantity.
- State the personal attributes required by the position.
- Relevancy of contextual factors.
- Recommended attributes if any.

PRACTICAL EXERCISE (p. 10):

FACILITATION PROCESS

- Break the group into three small groups and let the small groups tease out the adverts (one advert per group).
- Allow a discussion on the adequacy of the advertisement, given the criteria discussed.
- Each small group to amend the adverts that they brought, such that the advert complies with the criteria listed on page 9.
- Check that all participants understand the acronym KPA, i.e. Key Performance Areas which means the main job outputs.



UNIT 4:

PREPARATION AHEAD OF THE SELECTION INTERVIEW

(p. 10)

- Record the unit outcomes on the flipchart.
- invite participants to state whether there are outcomes that they can link to this unit.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Receive input without censoring it.

Present material covered on pages 10–11, allowing questions for clarification and making sure that the information discussed is the latest in terms of HRM resolutions and relevant agreements with the unions.

FACILITATION PROCESS

Cover the material on pages 10-11, allowing questions for clarification.

EXERCISE (p. 11)

1. 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 on a panel. What would you do to ensure that there is no conflict of interest and that the interviews continue as scheduled?

BEST CASE SCENARIO:

The chairperson should communicate his/her discovery to the principal with a proposal that she/he be replaced to avoid any allegations of conflict of interest, whether real or imagined. The principal should coordinate replacements of both SGB representatives in the selection committee, and if suitable (in order to add value to the selection process) SGB replacements are found, the interviews will proceed as planned.

WORST CASE SCENARIO:

The chairperson communicates his/her discovery to the principal, who after unsuccessfully trying to find a replacement convinces the chairperson of the SGB/ Selection Committee to postpone the interviews. The principal frantically contacts all the candidates to inform them about the postponement. As soon as an alternative date is secured, the principal informs the candidates of the alternative date and proceeds with a neutral panel that meets all the requirements

2. Using your own SGB, put together a panel that will be acceptable and outline procedures that you will follow before the interviews to ensure that all the role players are present in the interview.

Each participant puts together her panel and when receiving input, let participants indicate the rationale behind their choice, including the different panel members.



UNIT 5:

ADMINISTRATIVE RESPONSIBILITIES BEFORE THE INTERVIEW *(p. 12)*

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on a flip chart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Before concluding the unit revisit unit outcomes.

Cover the material on pages 12–13, drawing participants' attention to the fact that sifting procedures are provincially determined. What is important is that the principles of fairness and transparency must be upheld. This should also consider the rights of the applicants to get answers about reasons why they were not short-listed. As such accurate record keeping is a must.

PRACTICAL EXERCISE *(p. 13):*

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

Generate a list without censoring the participants' inputs, on a province-by-province basis. Select four provinces. Let the rest of the participants critique the list generated, for the purpose of improving it.

Lead a discussion about the principle of confidentiality. Emphasise that it is absolutely important to uphold the principle of confidentiality even at the stage of sifting information about candidates who had applied and who were eliminated.



UNIT 6:

PREPARING THE SELECTION PANEL ON THE DAY OF THE INTERVIEW (p. 14)

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit
- Before concluding the unit, revisit outcomes.

FACILITATION PROCESS

Cover the material on pages 14 –19, allowing questions for clarification

Make sure that participants understand the questioning format.

PRACTICAL EXERCISE (p. 20):

Allow pairs to practice this questioning technique for about seven minutes.

Give participants attributes around which they will construct questions from the list covered on pages 16 – 18.

Go over the checklist given on page 20.

Determine whether participants agree with this in principle.

In cases of disagreement on matters of principle, allow brief discussion.

Offer an explanation of why these principles are so important.

ROLE PLAYING: (p. 21)

DURATION: 30 minutes

FACILITATION PROCESS

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

- Chairperson
- Members of the selection panel (5)
- Candidates (3)

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



FACILITATION PROCESS

A. THE INTERVIEWING PANEL

- Make sure the panel has a chairperson.
- The roles of other panel members are clearly defined, e.g. SGB rep; educator; Co-opted expertise, etc.
- Facilitate the process of panel members selecting themes from the advert.
- Panel members generate questions around identified themes.
- Discussion and amendment of questions before the interviews begin.

B. INSTRUCTION TO OBSERVERS

- Pay attention to the process and identify flaws in the process.
- Identify possible legal violations.
- Observe both the spoken and unspoken.
- Make recommendations for improvement.

INPUT OF THE ROLE PLAYERS

- How they experienced the process.
- What was easy to implement?
- What was difficult to implement?



UNIT 7:

PREPARING WOMEN MANAGERS TO TAKE UNPOPULAR RECRUITMENT AND SELECTION DECISIONS (p.22)

DEALING WITH UNIT OUTCOMES (p. 22)

- v Record the unit outcomes on a flipchart.
- v Invite participants to state whether there are outcomes that they can link to this unit.
- v Receive input without censoring it.
- v Highlight those participant expectations that are in line with the objectives of the unit.
- v Before you conclude the unit, revisit the outcomes.

USING THE FOLLOWING RATING SCALE, INDICATE HOW YOU FEEL ABOUT THE FOLLOWING STATEMENTS (p. 22)

OFTEN = 1	SOMETIMES = 2	RARELY = 3
1. I feel confused in sifting and short-listing because I would like to give all applicants a chance.		
2. I know how scarce jobs are and it makes me feel sad that other people are rejected.		
3. I often cannot help but assist the candidates if they cannot give right answers because I know they know the right answers.		
4. I feel obliged to make the candidates less stressed during interviews.		
5. I just think the idea of a panel interview is so unfair for candidates.		
6. At times I go overboard to accommodate the candidate, to the irritation of my colleagues.		
7. I often try to come up with the easiest possible questions for candidates, to make things easier for them.		
8. I often feel like intervening when the selection panel asks too many difficult/ irrelevant questions.		

EMPHASISE THAT:

- Selection is about exclusion.
- Exclusion should be done on a fair basis.
- The process must lead to the selection of the best person for the job within the parameters of current policies.
- You are not being fair if you treat different candidates differently.
- This holds good even for interviewing female candidates.



GUIDELINES ON USING SELF-AFFIRMATION (pp. 23-25)

Let each participant identify recruitment and selection behaviour that they are prone to exhibit in an interview that is detrimental to selecting the best candidate for the job within the parameters of DoE policy and the legal framework.

Participants must indicate why the identified behaviour is counterproductive.

Select self-affirmation statements that help participants overcome counterproductive behaviour in recruitment proceedings.

Mark these and recite them whenever you face recruitment activities.

If you repeat them regularly, you will hopefully internalise them and have them guide your behaviour in recruitment activities.

PRACTICAL EXERCISE (p. 25):

From the group of workshop participants, constitute a selection panel and decide on their different roles. Let one participant serve as a candidate and 5-7 participants 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 of giving the panel constructive feedback at the end of the session.

FACILITATION PROCESS

STRUCTURE THE FEEDBACK AS FOLLOWS:

1. Feedback about the process as a whole:

.....

2. Feedback to the candidate:

.....

3. Feedback to the chairperson:

.....

4. Feedback to the panel:

.....



SECTION B

Explain that while section A focussed on equipping participants with skills they need to select the best candidate for the job, Section B aims at equipping participants with skills they need to advance in their careers

UNIT 8:

PREPARING TO CLIMB YOUR CAREER LADDER *(p. 26)*

DEALING WITH UNIT OUTCOMES *(p. 26)*

- Record the unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Before concluding the unit, revisit unit outcomes.

Cover the material on pages 26-28, allowing questions for clarification.

FACILITATOR' S INPUT ABOUT MEETING ALL THE REQUIREMENTS

When women managers and women in general get into the habit of applying for every senior post regardless of whether they qualify or not, they often fall into the trap of not being taken seriously. Choose your battles, and in making such choices be realistic, i.e. apply for positions for which you meet at least all the minimum requirement stated for the position.

PRACTICAL EXERCISE *(p. 28):*

Go to the list of different things that one needs to do to build one's career. List those that you have already done/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 will apply to accomplish what you have not done.



EXAMPLE:

DONE	TO DO
Exceed requirements of formal qualifications needed for the next post.	Exposure to financial management
	Manage people
	Become computer literate
	Polish my listening skills
	Polish my CV
	Develop my public speaking skills

1. Take input from 2-3 volunteers.
2. Record it on the flip chart.
3. Bring participants' attention to subtle things like:
 - Being well-read.
 - Awareness of the legislative framework.
 - Projecting a winning attitude.
 - Not whining about problems, but also proposing solutions.
 - Projecting an image that says: "You cannot afford to overlook this efficient professional."

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

1. Attend PFMA workshops and ask to sit in as an observer in the finance committee of our social club.
2. Acquire self-help manuals on effective listening and approach the counselling centre of institution X.
3. Enroll for computer literacy classes Aug-Dec 2002.
4. Attend the departmental assertiveness training workshops.
5. Use self-affirmation statements to internalise and demonstrate that I am in charge.



UNIT 9:

BUILDING AN ATTRACTIVE CURRICULUM VITAE (p.29)

WORKSHOP PARTICIPANTS MUST BRING COPIES OF THEIR CVS DEALING WITH UNIT OUTCOMES (p.29)

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Before concluding this unit, revisit unit outcomes.

FACILITATION PROCESS

Emphasise the importance of a curriculum vitae that sets you apart from the rest.

FACILITATOR'S NOTES

Your CV constitutes the first point of contact between you as an applicant and a panel that holds the keys to your dream job. As such it has to be:

- Professionally presented.
- Factually accurate.
- Logically presented.

Your C.V. should actually say: " Here is the candidate you are looking for, look no further."

FACILITATION PROCESS

Cover the information given on pages 29-31, allowing questions for clarification.

PERSONAL INFORMATION AND YOUR RIGHTS

You want to give the panel enough information so that they get a sense of who you are, where you are going and what your personal strengths are. You need not give too much information that can be used against you, or information which is irrelevant to making an appointment.

You also want to demonstrate that you know your own rights, because you cannot possibly respect other people's rights without knowing and asserting your own rights.

The following types of information should not be given in your CV, as especially prejudiced panel members can use it against you:

- Marital status.
- Number of dependents.
- State of health.
- Reasons for leaving previous jobs.

It is your responsibility to give accurate information, and as a matter of fact, any falsification in your CV constitutes sufficient grounds for dismissal.



INFORMATION TO INCLUDE:

- Full names.
- Contact telephone/fax numbers.
- Physical/postal address/email address.
- ID number for the panel to determine both age/citizenship.
- Complete and accurate information about your qualifications, including formal, RPL, workshops/seminars.

PRACTICAL EXERCISE (p. 34):

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

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

FACILITATION PROCESS

INVITE PARTICIPANTS TO AMEND THE FOLLOWING SECTIONS:

- Personal identification section of their CVs by eliminating information that is not necessary.
- Include all the necessary information.
- The purpose is to give the selection panel enough relevant personal information that enhances decision-making.

IDENTIFYING LEADERSHIP ROLES YOU HAVE PLAYED

At some point in your life you must have played some leadership role. The rule of thumb is to confine this within the past 10 years, thereby meaning that for relatively inexperienced applicants there is room to include college/university/technikon experiences. Whereas for more matured applicants there is room for the inclusion of leadership roles played in extra-curricular/community-based activities.

Invite participants to think of the leadership roles they have played and include these in their CVs.

PRACTICAL EXERCISE (p. 35):

FACILITATOR'S INPUT

A CV is not a static document. It has to be adjusted according to requirements of each job for which you apply. Ideally you should keep a soft copy of a CV that you have to adjust according to the demands of a particular position. The process of adjusting your CV has nothing to do with falsification. The different versions of one's CV are in essence the same.

What keeps changing is the sequencing, depending on what wants to highlight, e.g. if the job you are aspiring for relates to the experience you had five years ago, a functional approach to CV writing may be more desirable than a chronological approach. Often one



finds that if the information for which selection panel members are looking is tucked away, they may overlook it completely.

What format have you used in your CV, i.e. is it a chronological format or functional?
If chronological, what sequence have followed, i.e. starts from now to the past or past to now?
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 WORDS TO USE IN YOUR CV (p. 32)

1. Circle all the words that represent flowery language in your CV.
2. Circle all the "I" s in your CV.
3. Replace these with action verbs that communicate competence, direct involvement.
4. Take inputs from at least three participants, highlighting what was replaced and with what action verbs?
5. Pay attention to flow/coherence.

WHAT TO INCLUDE IN THE WORK EXPERIENCE SECTION (pp. 32–33)

Often capable women lose out, either due to not investing enough time in the CV writing process or through complacency that makes them think they are known within the education fraternity. Your CV is the very first point of contact between yourself and the selection panel, and hence it should:

- Speak for you to anyone who reads it, regardless of whether they know you or not, and generate a desire to at least see you in the interview.

It is not enough to give just job titles and assume that everyone knows, for instance, what a principal does. Your own experience may be different from that of the principal next door in terms of:

- Learner enrolment.
- Staff composition.
- Subject offering.
- Other sources of funding, etc.

In the interest of making your CV stand out, spell out the different competencies that you have developed!

CONTRIBUTIONS TO THE PROFESSION (p. 34)

This includes every task team/ working group/ ad hoc committee that you have served in within the school, district, region, province, national.



EXTRA-CURRICULAR ACTIVITIES (p. 34)

This should include extra-curricular activities at school and your own extra curricular activities, e.g.

- Treasurer of a social club.
- Convener of a support group for abused women.
- Chairperson of a debating society, etc.

PRACTICAL EXERCISE (p. 34)

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?

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

FACILITATION PROCESS

- Give participants 15 minutes to go over their CVs and amend them accordingly.
- Indicate that you will need to be provided with copies of updated CVs, as part of follow-up activities.

FACILITATOR'S INPUT

A CV is a document that is very much alive.

Emphasise the need to update it every year-end to keep it up to date, regarding professional development initiatives, the acquisition of additional experience, the acquisition of additional qualifications, etc.

THE MYTH OF ONE CV

Go over the material covered on page 35

FALSIFICATION OF CV

Falsifying one's CV is not only unethical, but also criminal because:

- CV's are a means for predicting future job performance. Hence if the prediction is based on lies, the chances of success on the job become quite minimal.
- The rights of other qualifying candidates are violated if a person who does not qualify is appointed.



UNIT 10:

WRITING A COVERING LETTER (p. 36)

DEALING WITH UNIT OUTCOMES (p. 36)

- Record unit outcomes on a flip chart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Before concluding the unit, revisit the outcomes.

FACILITATOR'S INPUT

While application forms serve the purpose of standardising the information received, in order to render it comparable, the covering letter puts a personal touch to the process of applying for a position and distinguishes refined, matured applicants from novices.

A covering letter addresses the specific position for which you are applying and as such, you cannot afford to use a generic letter.

- Read the advert carefully.
- Determine the essence of the job.
- Determine why you want to apply for the position.
- Justify your suitability for the position.
- Be concise and use correct grammatical forms/spelling.





SECTION C

UNIT 11:

YOU HAVE SECURED YOURSELF AN INTERVIEW – NOW WHAT? (p.39)

DEALING WITH UNIT OUTCOMES (p. 39)

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those participant expectations that are in line with the objectives of the unit.
- Before concluding the unit, revisit the outcomes.

EXERCISE (p. 39)

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?

The number of dependents you have **(Not justified under any circumstances)**

Your ability to handle male subordinates **(Justified if known that the position requires the handling of male subordinates)**

Your ability to travel **(Justified if the position demands lots of travelling)**

Your ill health **(Justified if the position is known to be stressful)**

The distance between your home and your office **(Justified from the angle of seeking to find out whether the candidate plans to relocate should they be offered the position)**

ROLE-PLAY (p. 42)

1. Constitute a selection panel of no more than 6 members, using a real position that existed in the recent past.

2. 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.

- This exercise is the synthesis of the entire module.
- Plan on having at least two separate panels to interview at least one candidate each for the same position.
- Panel decides on roles and responsibilities.
- Decide on two adverts to be used.
- Decide on the four candidates.
- If the panel is not in session, the selection panel serves as observers.



INSTRUCTIONS TO OBSERVERS

Look for the following:

- Legal compliance of the behaviour of panel/interview process.
- The extent to which key performance areas have been addressed by the panel.
- Non-verbal behaviour of the panel members.
- Behaviour of the candidates.
- What the candidate needs to improve on.
- Overall impression of the interview.

11. CONCLUSION:

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.

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.

12. THE WAY FORWARD

- Participants to type the CVs reworked in the workshop.
- Participants need to annually update their CVs. The trainer will do spot checks of participants who received training.



ANNEXURE 1: EXCERPT FROM THE PUBLIC SERVICE ACT of 1994

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, 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, 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.
- (3) If the head of the office, branch, sub-department, 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.

[S.13 substituted by s. 10 of Act 47 of 1997.]



T

able of contents

1. Background to the module	2
2. Pre-workshop diagnosis	2
3. Practical considerations	2
4. Practical activities	3
5. Before you begin	3
6. Dealing with unit outcomes	3
7. Suggested time frames	3
8. Exercises	3
9. Allocation of time	4
10. Follow-up activities	4
11. Underlying assumptions	4
Unit 1: Understanding self-identity	5
Unit 2: Questions of self-identity	8
Unit 3: Self-concept	12
Unit 4: Building a positive self-image	15
Unit 5: Managing your time	20
Unit 7: Managing time spent on the phone	23
Unit 8: Tools to use for effective time-management	25
Unit 9: Handling drop-in visitors	26
12. Workshop	28
13. Conclusion	28



FACILITATOR'S NOTES: SELF MANAGEMENT MODULE

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that the training manual is designed to be both a training manual and a resource book for women managers who on their own, may need to sharpen their skills in managing themselves both personally and professionally. Hence it will be a futile exercise to try to cover everything.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any form of training on self-management may need the entire training module. Unless the training workshop extends over a day, it may not be possible to cover everything in depth and allow for the optimum degree of participant involvement.
- Select themes to be covered from the manual according to the identified needs.
- Decide on the degree of emphasis according to the identified needs.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and should try to clarify your own understanding of the content before the workshop.
- Because the modules are in the OBE format, it also becomes important that time be set aside for practical exercises to determine whether unit outcomes have been reached.
- At the end of the whole module participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

- Training module on "Empowering Woman Managers to Manage Themselves"
- Paper
- Pens
- Flipcharts
- 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

For personal development training interventions like this one, 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 practical activities is to allow participants to explore the content at a deeper level and to gain insight into what the content means for participants personally and for practical purposes. This makes practical activities a vital part of the training. Furthermore, the practice of requiring participants to report back also offers them an opportunity to polish their public speaking and communication skills.

5. BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to question the participant's beliefs attitudes and habits. It therefore becomes important that the facilitator approaches this task with the sensitivity it deserves, while also creating a platform from which participants can gain insight into their own counterproductive ways of managing their personal and work affairs. The training intervention should also afford participants an opportunity to learn from one another.

5.1. DEFINING THE CONCEPT OF SELF MANAGEMENT

Start by explaining the overall concept of self management, i.e. self management refers to the ability to run and coordinate your personal affairs, e.g. going to the bank, dentist, hair dresser; your family matters e.g. caring for kids, household maintenance; and work matters such that the personal and family matters interfere least with work matters and vice versa. This can come only through discipline and effort.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit highlight the unit outcomes, and before you move to the next unit check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

0000000The least amount of time that one can allocate for this module is one day. This is premised on the notion that the facilitator is able to select the themes that best address the needs of most participants, and therefore will not cover everything. In cases where everything is to be covered, at least one and a half days will be needed.

8. EXERCISES

The nature of this module calls for individual involvement in practical exercises and voluntary sharing with the group. Since the module is about personal issues it is important that the training session be handled with sensitivity. The practical exercises are mainly individual exercises with participants being encouraged to share their assessment of their own situation when they feel comfortable to do so. The purpose of these activities is to allow participants to gain insight into their own behaviour. There is a need to balance facilitator input with participant involvement.





9. ALLOCATION OF TIME

- This depends on the themes/ units to be covered.
- Plan for an average of 40 minutes per unit across the 8 units.
- Use your judgment on what is to be emphasised, based on identified needs.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual behaviour change, and to determine the impact of training via questionnaires.

11. UNDERLYING ASSUMPTIONS

The whole module is premised on the notion that women can effectively manage others and resources only if they can manage themselves well. This is further necessitated by the fact that women continue to be mainly responsible for the home and child rearing even if they climb the corporate ladder. This therefore necessitates that women treat time as a very valuable commodity if they are to succeed in their careers, and that a healthy balance needs to be struck between work, family and personal time. This issue of time and balancing of one's needs and responsibilities should be looked at in the context of the broad aims of this module.



UNIT 1:

UNDERSTANDING ONE'S OWN IDENTITY AND SELF-CONCEPT (p.1)

DEALING WITH UNIT OUTCOMES

- Record the unit outcomes on a flip chart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit unit outcomes.

FACILITATOR'S INPUT

Give the following example:

If I feel that I am an incapable person I project myself as someone who is not good enough, who is inferior and who wants to occupy the back seat. Others begin to see me in that light, which further reinforces my belief in my incapability. This is often reflected in statements like: "Who am I after all, I will never be able to do that - not in a million years."

PRACTICAL EXERCISE (p.2)

FACILITATION PROCESS

- Participants should complete this section in their training manuals.
- Encourage participants to strive for honesty.
- Since this is a very personal matter, the purpose of the exercise is to allow participants an opportunity to explore their inner selves.
- Participants should share with the group only if they are comfortable doing so.

PRACTICAL EXERCISE (p.2)

Who are you?

INSTRUCTIONS TO PARTICIPANTS

When answering this question focus on yourself, and not who you are related to or associated with. Answer this question with the focus on the unique combination of attributes that make you the unique person that you are.

EXAMPLES:

- I am a hard-working woman of integrity who enjoys working with people.
- I am a woman of above-average intellect who enjoys work of an analytical nature.

WHAT IMAGE DO YOU STRIVE TO PROJECT?

In answering this question participants should strive to cover the variety of caps that they wear in a variety of settings.



EXAMPLES:

- In work-related settings I always strive to project a professional image.
- In a church setting I project an image of a concerned parishioner.
- At a parent/teacher association I project an image of a concerned parent.

HOW DO YOU FEEL ABOUT YOURSELF?

This question relates to how you generally feel about yourself rather than how you are feeling now.

EXAMPLES:

- I generally feel good about myself.
- I often feel that I cannot measure up to other people's expectations.
- If I could I would change everything about myself.
- I feel good about myself if I have done something good.

WHAT DO OTHERS THINK OF YOU?

This has to do with what participants believe other people think of them.

EXAMPLES:

- Other people think that I am abrasive.
- Other people think I am aggressive.
- Other people think I am demanding.

PRACTICAL EXERCISE (p.2)

FACILITATOR'S INPUT

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).

FACILITATION PROCESS

- In a big group session ask participants to categorise the following statements as representing self-identity (SID); self-image (SIM); self-esteem (SES) or self-concept (SC).
- In cases of correct responses no further discussion is necessary.
- In cases of incorrect responses, explore further.
- If participants do not agree, give the correct response, brief justification and proceed.



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





UNIT 2:

QUESTIONS OF SELF-IDENTITY (p.3)

DEALING WITH UNIT OUTCOMES

- Record unit outcomes on a flip chart
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding this module, revisit the unit outcomes.

FACILITATOR'S INPUT

- Describe self-identity issues facing women, highlighting what is in the introductory paragraph of Unit 2.

GUIDE TO USING SELF-AFFIRMATION STATEMENTS

Use the self-affirmations statements to change beliefs that you have that you want to change. For instance, if you have already developed a strong sense of independent self-identity, you do not need to use this particular self-affirmation statement.

RULE OF THUMB: Self-affirmation statements are useful only if you are personally facing the issue that the statement purports to address.

IF YOU DO FACE THE ISSUE:

- Repeat the statement when you face the issue.
- Incorporate the self-affirmation statement into your self-talk.
- By repeating it over and over again you begin to believe it and internalise it.
- As you internalise it you begin to act in a manner that conforms to the statement.

EXAMPLE (p.4)

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

FACILITATOR'S INPUT

Emphasise that any personal strength can also be a weakness, depending on the context:

EXAMPLES:

Hardworking can be considered a strength as long as the hard-working person does not use his/her hard work as a standard according to which everybody else is judged, without realising that at times hard work is necessitated by lack of skills.

EXAMPLES OF STRENGTHS (p.5)



FACILITATION PROCESS

- Participants complete the space provided in the training manual.
- This is sensitive, so sharing by the participants should be kept voluntary.

You may demonstrate what the participants should do by using examples listed below:

PERSONAL STRENGTHS

Conscientious

Punctual

Strategic orientation - ability to see the bigger picture

Attentiveness to detail

Administrative acumen

Good with numbers

Patient

People skills

EXAMPLES OF HOW TO OVERCOME PERSONAL WEAKNESSES (p.5)

WEAKNESS	PERCEIVED ABILITY TO OVERCOME
Late coming	Planning and using devices like alarm clock / Set my watch 30 minutes ahead of time / Reward myself for keeping to time weekly / monthly
Aggression	Can be overcome by understanding why one is aggressive and taking corrective measures / Listen more / Take time out when I am about to act aggressively
Procrastination	Planning / Goal setting/ Use year planner / Adopt a project approach / Monitor my progress on projects
Disorganised	Planning / Adopt a project approach/ Time management
Lack of Motivation	Set yourself realistic goals / Reward myself for achieving those goals
Opposition to authority	Acknowledge that there is a problem, and seek the root cause / Adopt a motto of listening more and talking less / Avoid jumping to conclusions



What you can do about the weaknesses you cannot overcome

IDENTIFY YOUR WEAKNESS	INDICATE WHAT YOU CAN DO TO MINIMISE ITS IMPACT ON YOUR JOB
In-attentiveness to detail	Adopt a standard procedure of getting all lengthy documents edited first
Lack of financial management skills	Get training on PFMA and attend workshops on Financial Management for Non-financial Managers
People-oriented to the point of being taken advantage of	Attend assertiveness training
Abrasive	Acknowledge that there is a problem / Listen more / talk less / give others a chance /clarify your own misunderstandings / reward yourself for behaving non-abrasively

PRACTICAL EXERCISE (p.5)

EXPLANATORY NOTE

Developing an action plan to build on your strengths (p.5)

- An action plan is a concrete blueprint that gives an indication of what needs to be done and by when, in an attempt to build your strengths. This can include virtually any action that you deem necessary to build your strengths, including such activities as community-based ones.

FACILITATION PROCESS

- Participants complete the space provided in the training manual.
- This is sensitive, so sharing by the participants should be kept voluntary.
- Can demonstrate the exercise by using examples listed below:

EXAMPLE:

If you have good leadership qualities that your current position does not tap, you can aim at participating more in church activities/extramural activities that will allow you to develop this strength.

- What are you going to do to make sure that your strengths are exploited to the maximum?
- Developing an action plan to build on your strengths, i.e. what are you going to do to make sure that your strengths are exploited to the maximum?



The following are merely examples. Invite participants to generate their own original ways of building on their own personal strengths.

STRENGTH	ACTION TO MAXIMIZE STRENGTH
Formal writing	Volunteer to write reports at least 3 times this year
Public motivational speaking	At least 4 times this year, I will provide motivational speeches to learners and I will liaise with the HoD: Guidance in this regard
Attentiveness to detail	I will volunteer my services as an editor of all important documents in the district office (Assuming you already work there)
Conflict management	I will propose that in cases of contentious issues I be allowed to serve in such committees where I can assist in conflict prevention





UNIT 3:

SELF-CONCEPT AND WOMEN IN MANAGEMENT (p.6)

DEALING WITH UNIT OUTCOMES

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the unit.
- Before concluding the unit, the revisit unit outcomes.

GENERAL MANIFESTATIONS OF THE SELF-CONCEPT (p.6)

FACILITATOR'S INPUT

- Spend some time explaining the theoretical framework relating to the general manifestations of different types of self-concepts.
- Make sure you have a sound theoretical understanding beforehand.
- On a flip chart write down the different types of self-concept.
- Invite participants to give examples and evaluate the appropriateness of examples given, using (p. 6 of the Manual as the basis).

AS A WOMAN MANAGER DO YOU:

* Understand and consider your personal limitations in doing your work?

** Do you push yourself beyond reasonable limits?

* Do you realistically know what you can and cannot do?

** Are you often surprised that others think you are smarter than you feel.

* If you are asked to volunteer for a task do you know offhand what you can / cannot do.

** Do you need constant reassurance that you are doing a good job.

** Do you feel important by associating with important people.

EXPLANATORY NOTE

* These attributes are common to people who know themselves well and this constitutes a sound foundation for the formation of a realistic self-concept.

** These attributes are common to people who do not know themselves and are therefore prone to develop unrealistic self-concepts.



EXTERNAL FACTORS AFFECTING THE SELF-CONCEPT OF WOMEN (p. 7)

EXPLANATORY NOTE

The key to developing a positive realistic self-concept is to adopt a balanced approach that seeks to integrate both successes and failures in a manner that allows you to capitalise on your successes and learn from your failures.

INTERNAL FACTORS AFFECTING THE WOMAN'S SELF CONCEPT (p. 7)

FACILITATION PROCESS

- Invite participants to deal with this based on their own personal experiences.
- Record input on the flip chart.
- For contributions that are in line with what is being discussed, record and move on.
- Tease out only those contributions that are not in line with what is discussed
- Only you as the facilitator will interact with active participants, i.e. do not open debates.

FACILITATOR'S INPUT

Emphasise here that the focus is not on isolated instances but on behaviour patterns. For instance, if a woman manager is put in a corner that requires her to lobby the members of the SGB on one very important matter ahead of the meeting for the purpose of giving them adequate background on the issue, this is not necessarily an indication of being motivated by the need to please, need for approval, etc. However if this becomes a pattern, it becomes a problem.

FACILITATION PROCESS

- Present the information given in the Manual, pages 7-8.
- Allow participants to ask questions for clarification.
- Invite participants to record in their workbooks issues that they face in building their own self-esteem.
- Invite participants to select the self-affirmation statements that will allow them to overcome their issues.





GUIDE TO USING SELF AFFIRMATION STATEMENTS (pp. 7-8)

Identify the issues you face that prevent you from developing a positive self-esteem, and identify self-affirmation statements that help you overcome the identified issues:

- Repeat the statement when you face the issue.
- Incorporate the self-affirmation statement into your self-talk.
- By repeating it over and over again you begin to believe it and internalise it.
- As you internalise it you begin to act in a manner that conforms to the statement.
- Invite participants to complete this exercise (p.9) by indicating how regularly the statements written below reflect how they feel:
- Never; Rarely; Often, Always.

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	
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			

If you experience these feelings often, (as suggested by a rating of often / always 10 times or more) the chances are you suffer from low self-esteem.



UNIT 4:

BUILDING A POSITIVE SELF-IMAGE (p. 9)

DEALING WITH UNIT OUTCOMES.

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit the outcomes.

EXPLANATORY NOTE

Behaviour is appropriate or inappropriate depending on the context. Women managers need to develop the skill of always determining what the context is, because the context always dictates the rules of the game. For instance, in a professional setting, mothering may be frowned upon.

- Read the cues.
- Assess the context.
- Determine what rules of the game apply.
- Apply the implicit rules as dictated by the context.

FACILITATION PROCESS

- Cover the theoretical material (pp.9-10).
- Record important points on the flipchart.
- Allow questions for clarification.
- Ask participants to give examples that illustrate points made.

STEPS IN BUILDING A FAVOURABLE SELF-IMAGE (p.10)

FACILITATOR INPUT

The rule of thumb is that in cases of congruence between how you feel about yourself and how you behave and how others feel about you and your behaviour, there is a definite need to change if the behaviour concerned is negative.

The feedback you get from others reflects how you are perceived, and the more the sources of this feedback the closer to the truth it tends to be.





IDENTIFYING WHAT YOU NEED TO CHANGE (p.10)

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

EXAMPLES

BEHAVIOUR YOU NEED TO CHANGE	CONCRETE STEPS TO CHANGE IT
Speaking out of turn	<ul style="list-style-type: none">Listen until the speaker finishesTest your understanding by summarising to yourself what was saidSeek clarification in cases of grey areasGenerate a responseRepeat the response to yourselfVerbalise the responseIf you are not the target of the discussion, do yourself a favour: SHUT UP!Reward yourself for a job well done
Lack of tact	<ul style="list-style-type: none">Make a conscious decision that you will always approach colleagues/subordinates privately to discuss issuesMake an effort to be polite at all timesMake notes of what you want to sayStay cool and should tempers rise, take time outRead from your notesRemind yourself that the other party is presumed innocent until proven guilty, and has a right to present their side of the storyReward yourself for a job well done!



STEPS IN BUILDING A FAVOURABLE SELF-IMAGE

FACILITATOR'S INPUT

USEFUL TIPS (p. 10)

Emphasise that if one seeks to change one's behaviour, it should be because one realises that the behaviour concerned is counter-productive.

Do not expect immediate results. This is a process.

Persist with the goal of changing one's behaviour even in the face of obstacles.

- (1) Remember you are changing your behaviour to become a better person. Therefore persist with your goal even in the absence of external reinforcement.
- (2) Reward yourself for attaining your goal.

CASE STUDIES (pp. 12)

FACILITATION PROCESS

- Divide the participants into two groups, each group tackling each case study.
- In small groups let the participants deal with questions raised in each case.
- Let each group report back to the plenary session via a spokesperson.
- Fill whatever gaps there may be.

CASE STUDY 1 (p. 12)

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

CASE STUDY 2 (p. 12)

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



CASE 1: ANSWER:

IDENTIFY THE PROBLEM

Ms X 's poor judgment when it comes to dress code is a problem because part of maintaining a professional image is about presenting oneself in a manner that forces the people you interact with to take you seriously by virtue of the way you present yourself.

WHAT DO YOU THINK WILL BE THE SHORT-TERM EFFECTS OF THIS SITUATION ON MS X 'S CAREER DEVELOPMENT?

Ms X may be perceived as a person who lacks professionalism and who wants to attract a sexual type of attention and this may be embarrassing to colleagues.

WHAT DO YOU THINK WILL BE THE LONG-TERM EFFECTS OF THIS SITUATION ON MS X'S CAREER DEVELOPMENT?

Ms X will lack the exposure that is vital for her to gain the experience to advance in her career, and also, she will not be taken seriously by her colleagues, both male and female. Colleagues who might feel her dress code to be offensive may even resent her.

HOW WOULD YOU ADDRESS THIS PROBLEM IF YOU WERE THE MANAGER?

I would call Ms X aside and indicate to her the importance of projecting a professional image if one is to be taken seriously. I would also point out that the difference between appropriate and inappropriate is dictated by context, and that a professional context demands proper grooming. Women need to be careful not to send double messages in the workplace. I would suggest to her that before she decided whether a clothing item is appropriate or not she should ask herself the following questions:

If someone did not know who she was, would that person approach her as a professional?

If she appeared before an audience would the audience be keen to hear what she had to say or would the audience be preoccupied with how she looks?

Does her outfit force people who interact with her to focus more on her body than what she has to do/say?

If the answer to these questions is yes, that outfit does not belong in the workplace!



CASE 2: ANSWER:

An unmarried female principal is your boss. In order to be friendly to staff she freely shares intimate details of 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?

This situation is clearly a problem, and the exact problem is that of inappropriate and too much self-disclosure. Schools need leadership, and a person in a leadership position cannot afford to be an open book because at some stage the personal and confidential information she freely shares about herself will be used against her.

HOW WOULD YOU DISCOURAGE HER FROM ENGAGING IN SUCH BEHAVIOUR?

I would politely indicate the following to her:

- Some aspects are personal and should be treated as such.
- The workplace consists of different types of people and should be treated as such.
- While a person in a leadership position will from time to time be required to counsel and support staff in crises, that requirement does not hold for staff.
- It is better to select a confidante, ideally outside of the work environment.
- If this confidante happens to be within the working environment, the sharing of personal information should be based on confidentiality.
- It also helps if the sharing is mutual, i.e. I trust you with my secrets and vice-versa.

WHAT DO YOU THINK WILL BE THE LONG-TERM EFFECTS OF THE PRINCIPAL'S BEHAVIOUR IF LEFT UNCHECKED?

- Not being taken seriously.
- Entrenching the culture of gossip mongering.
- Inculcating a lack of respect of confidentiality.
- Staff may use her personal issues against her.
- Blurring of boundaries between what is work related and what is personal.

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.

FACILITATOR'S INPUT

BASIS FOR SENSIBLE CONFIDANTE RELATIONSHIP

- You can trust me with your personal matters and I can trust you with my personal matters.
- I do not use your personal matters for any purpose whatsoever.
- The two of us are of the same social standing and I therefore cannot use the matters you share with me to enhance my own standing in society.
- In any leader, subordinates look for someone who can lead, and who has earned their trust and respect.
- In normal situations, subordinates do not look for a friend in a manager.



UNIT 5:

MANAGING YOUR TIME *(p.13)*

DEALING WITH UNIT OUTCOMES

- Record unit outcomes on a flip chart.
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit the unit outcomes.

EXPLANATORY NOTE

Women managers often find themselves under siege, working long hours, often engaging in “fire fighting” without having the time to focus on what matters most, i.e. providing strategic leadership. This leads to the women managers suffering from burnout without really demonstrating that they are capable of taking the sections of the education establishment they manage, be it the school, the district office, etc. to new heights.

FACILITATION PROCESS

- Go over the materials covered on pages 13–14.
- Highlight important points.
- Record these on the flip chart.
- Allow questions for clarification and occasionally invite participants to give examples.

WHY DOES YOUR POSITION EXIST? *(p.14)*

FACILITATION PROCESS

- Ask participants to complete the table on page 14 individually.
- Do they think they cover all the managerial leadership functions?
- Ask 3-5 participants to share what they have written.
- Record the input on a flip chart.

FACILITATOR’S INPUT

Share the following with participants:

- Any leadership position primarily exists to:
 - Provide leadership direction and guidance to the establishment;
 - Manage and control the establishment;
 - Perform administrative functions required to keep the establishment running, i.e. compliance with DOE regulations.

In allocating time to activities be guided by these leadership responsibilities, taking note of the fact that if you are spending too much time on any one of these, you are in effect neglecting the others.



PRACTICAL EXERCISES (p.14)

WHAT ARE KEY FUNCTIONS IN YOUR JOB	IDENTIFY KEY ACTIVITIES FOR THESE FUNCTIONS
Leadership – provide strategic direction	Constantly seek new opportunities Constantly seek ways to minimise threats Come up with plans to capitalise on opportunities and to minimise threats Writing proposals to achieve the above; Identifying key partners etc.
Guidance that has to do with a steering function, making sure that the ship is kept in the right direction	Ensure that all the subject departments are functioning well, i.e. in line with the notion of minimising threats and optimising opportunities within the parameters of DOE requirements
Administrative function that has to do with doing all the necessary paper work to ensure that the engine is kept running	Completion of necessary forms Submit all paperwork on time
Troubleshooting, i.e. solve problems	Know what is going well Know what is not going well Come up with strategies to address what is not going well Provide subordinates support, i.e. show them how to improve on what they are not doing
General familiarity with the issues	Do you generally know what is going on in your school and district office? Do you know the general state of learner morale, staff morale, general climate?



1) ASK PARTICIPANTS TO:

- Compare what they have entered under “what they are busy with”, with the functions required of any leadership role.
- Categorise the input received and determine:
 - What functions they seem to be spending more time on?
 - What functions are neglected?
 - What can they do to make sure they cover all the functions?

HINTS ON IMPROVING YOUR GENERAL FAMILIARITY WITH THE CLIMATE/ISSUES IN YOUR ESTABLISHMENT:

- Talk to staff in the staff room, passages, etc.
- Talk to learners on the sports field.
- Adopt a limited, well-regulated open door policy, i.e. dedicated time slots.
- Attend extramural activities to enhance your accessibility.

CONCLUDING REMARK

Generally, most managers in education perform the administrative and perhaps the management function relatively well, and often neglect the strategic function as well as the function of keeping themselves informed about the issues and the general climate and state of the staff and learner morale.



UNIT 7:

MANAGING THE TIME YOU SPEND ON THE PHONE *(p. 19)*

DEALING WITH UNIT OUTCOMES.

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit unit outcomes.

EXPLANATORY NOTE

Before you make that phone call ask yourself the following questions:

- What is the objective of this phone call?
- Is there no other more efficient way of achieving this objective?
- What do I need to have handy before making the phone call?
- How will I know I have attained my objective?

You are ready to make that phone call only after you have clarified these issues in your mind and you are convinced that making that call is the most viable way to achieve your objective!

Present the material covered on pages 19 and 21, allowing questions for clarification and allowing participants to share their experiences.

PRACTICAL EXERCISE *(p. 20)*

FACILITATION PROCESS

- Divide participants into 3 groups and allocate each group a scenario to deal with.
- Each group to address the issues raised in each case.
- Come up with a consolidated group response to report back in plenary session.
- Record input and questions in grey areas.
- Allow for the addition of what could have been left out.



ANSWERS:

1. Excuse me Mr/ Ms Dr T, sorry for interrupting you, I do not mean to be rude. Can I just record what issues you wish to raise as I feel that I am not in a position to answer your questions off-hand. After taking all the issues down I will have to trace the memos you are referring to, as I have no recollection of such memos. I will call you back within an hour to clarify your queries.

OR

I know we have not received the memo you are referring to as it was alluded to in our staff meeting yesterday. Kindly fax the memo for my attention to this number XXXX. Upon receipt of the faxed memo I will have to liaise with HOD s and I will be in a position to get back to you with answers to your queries by close of business today.

2. Your function is secretarial and mine is different from yours and we need to get to a common understanding of how our roles complement rather than duplicate each other. To help you perform your function well, I need time to take you through the general filing system and to explain to you what is where. We cannot do this during office hours, as the office is a very busy one. Think of a day/time before/weekend/or after office hours when we can do this. It is quite urgent, because my ability to function effectively depends on you being able to function optimally.
3. This is definitely a problem because it indicates that there is blurring of boundaries between work time and private time. Except for emergencies, work time should be used for work and private time for private matters.

HOW TO DEAL WITH IT:

BEFORE YOU MAKE A PRIVATE CALL AT WORK ANSWER THE FOLLOWING QUESTIONS:

Is this out of the ordinary (If yes, go ahead, but if it is routine you are wasting the taxpayers' money).

Can this wait (If the answer is no, go ahead and make that call, e.g. bank manager who is not available after hours/emergency).



UNIT 8:

TOOLS TO USE FOR EFFECTIVE TIME MANAGEMENT *(p.21)*

DEALING WITH UNIT OUTCOMES

- Record unit outcomes on a flipchart.
- Invite participants to state whether there are other outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit unit outcomes

PRACTICAL EXERCISE

Choosing a diary(p. 21)

What factors do you consider when choosing a diary?

FACILITATION PROCESS

- Let participants individually answer this question in the Training Manual.
- Shelve this for later.
- Go over the rest of the unit, highlighting important points
- Record important points on the flip chart.
- At the end of the module, ask participants to share with the group what other factors they will consider in selecting their next diaries.



UNIT 9:

HANDLING UNANNOUNCED VISITORS (p.23)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 23)

- Record unit outcomes on a flip chart.
- Invite participants to state whether there are outcomes that they can link to this unit.
- Receive input without censoring it.
- Highlight those outcomes that relate to the module.
- Before concluding the unit, revisit the unit outcomes.

EXERCISE ON PAGE 24

FACILITATION PROCESS

- Let participants individually answer this question in the Training Manual.
- Invite participants to share in a big group.
- Record input on the flip chart.
- Add the important strategies that participants may have left out.
- Emphasise the participants' input that is original and relevant.



WHAT IS THE MOST SERIOUS PROBLEM THAT YOU FACE, ASSOCIATED WITH THE ARRIVAL OF DROP-IN VISITORS?

POSSIBLE ANSWERS

- Inability to meet deadlines
- Having a rowdy office
- Disturbance of colleagues
- Irritation and annoyance
- Lack of planning

WHAT BEHAVIOUR DO YOU NEED TO CHANGE TO DISCOURAGE DROP-IN VISITORS?

- Stop encouraging drop-in visitors.
- If drop-in visitors have to be seen because of emergencies, stick to the topic.
- Stop entertaining the discussion of issues that can wait.
- Do not provide drop-in visitors with any comfort, e.g. talk while standing; talk to them as you head for the venue of your next engagement, and do not offer tea.
- If you receive personal drop-in visitors at work, totally discourage this by telling them your work suffers if you have to entertain personal visitors at work.

WHAT STRATEGY ARE YOU PLANNING ON USING TO MINIMISE DROP-IN VISITORS?

- Change configuration of my office furniture.
- Coach my secretary.
- Accept drop-in visitors only at dedicated time.
- Post drop-in time slots on the notice-board.
- Accept only work-related drop-in visitors from afar.

Cover the materials on page 24, allowing questions for clarification



FACILITATOR'S CONCLUDING REMARK

Emphasise the following:

- Mastering the art of self-management both personally and professionally is a journey.
- As such, it needs practice.
- Some days will be better than others.
- Your responsibility as a woman manager is to make sure you:
 - Read situations correctly.
 - Behave according to the dictates of the situation.
 - Lead by example.
 - Try as much as possible to protect work time and space from intrusion by personal and family matters.

12. 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.

13. 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.



T

able of contents

1. Background to the module	2
2. Pre-workshop diagnosis	2
3. Practical considerations	3
4. Practical activities	4
5. The role of observers	3
6. Before you begin	3
7. Dealing with unit outcomes	4
8. Suggested time frames	4
9. Exercises	3
10. Allocation of time	4
11. Follow-up activities	4
12. Preface to the module	4
13. Dealing with intended outcomes of the unit	4
Unit 1: Understanding harassment	5
Unit 2: Attitudes and beliefs	7
Unit 3: Cross-cultural differences in behaviour	9
Unit 4: Handling sexual harassment as a victim	10
Unit 5: Lodging a formal complaint	15
Unit 6: Handling sexual harassment of subordinates by superiors	20
14. Workshop evaluation	21
15. Conclusion	21



FACILITATOR'S NOTES EFFECTIVE DEALING WITH HARASSMENT AND SEXUAL HARASSMENT

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that this module is designed to cover all forms of harassment, including sexual harassment. Although sexual harassment has over the past years gained prominence due to advances made in women's liberation, it is important to emphasise that lots of people, both men and women, are subjected to other forms of harassment in the workplace.

The module therefore seeks to equip women managers with skills they need to effectively deal with harassment, whether it is a case of the woman manager being the victim of harassment or the woman manager having to mediate in harassment cases between colleagues or subordinates. The covering of both perspectives is premised on the notion that the module must equip women managers with skills to face whatever challenge may come their way in the area of dealing with harassment.

The module is structured such that it can be used as both a training manual and a resource book for women managers who, on their own, may use it to improve their skills in dealing with harassment and sexual harassment issues.

Pre-workshop diagnosis is important for this module, as it will help determine the main area of workshop focus.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. It may be necessary to cover the whole module in order to accommodate participants who have never received any form of training on the handling of harassment in the workplace. Such participants cannot effectively articulate their needs in relation to the training materials that are available.
- The first round of training should aim at covering the entire module.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and generally with the topic of sexual harassment. You should try to clarify your own understanding of the content before the workshop. Question your own belief system about the subject of harassment, sexuality and the expression thereof in the workplace.
- Finally, you as a facilitator must feel reasonably comfortable with your own beliefs about the subject of harassment and sexual harassment.
- Because the modules are in the OBE format, it becomes important that time be set aside for practical exercises to determine whether unit outcomes have been reached.
- At the end of the whole module participants need to complete the Workshop Evaluation Forms.



3. PRACTICAL CONSIDERATIONS

WORKSHOP MATERIALS

Facilitator to bring the Facilitator's Guide for the Women and the Law Module for purposes of referring to the pieces of legislation listed below:

The Constitution

Constitutional rights

Constitution: Chapter 2 Sections 9 & 10

Employment Equity Act

Chapter 1 Sections 5, 6,

Stationery

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 panel sessions is desirable.

NUMBER OF PARTICIPANTS

For personal development training interventions like this one, it is ideal to keep the numbers small, i.e. 20 at most, in order to create space for interaction with the group.

4. EXERCISES

The purpose of practical exercises is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. Role-playing is the key practical activity that will be used in this module, the reason being that, the participants will need to put into practice the theoretical information they acquire.

5. THE ROLE OF OBSERVERS

In role-playing sessions, the participants who are not actively participating will observe the proceedings and give constructive feedback to the role-players.

6. BEFORE YOU BEGIN

SHARE THIS WITH THE PARTICIPANTS

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It covers the issue of rights that the participants grant themselves and others, as well as how far the participants are prepared to go in asserting those rights. This may require a serious paradigm shift on the part of the participants.





7. DEALING WITH UNIT OUTCOMES

At the beginning of each unit highlight the unit outcomes, and before you move to the next unit check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

8. SUGGESTED TIME FRAMES

The least amount of time that one can get by with is a day for the whole module. This is based on the notion that the DoE has not provided any such training before targeting staff.

9. PRACTICAL ACTIVITIES

The nature of this module calls for group involvement in doing practical exercises, and while voluntary participation in group activities is ideal, participants who do not voluntarily participate should be encouraged to participate. The purpose of these activities is to allow participants to test their own beliefs about the subject of harassment and sexual harassment. Participant involvement is promoted via role-playing and case studies.

10. ALLOCATION OF TIME

- Plan to dedicate at most 30 minutes to each unit of content input and 15 minutes to practical exercises (8 minutes to the exercise and 7 minutes to report back).
- If some units provoke more discussion, allow this within reasonable limits and make up the lost time either by cutting on tea/lunch breaks or by spending less time on less provocative units.
- Use your judgement to determine which units need more emphasis.

11. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual behaviour change. The exact nature thereof will be explained as part of the conclusion.

12. PREFACE TO THE MODULE ON HANDLING HARASSMENT

Explain that harassment is a fundamental human rights issue.

13. DEALING WITH INTENDED OUTCOMES OF THE UNIT

- At the beginning of each unit highlight the unit outcomes.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.



UNIT 1:

UNDERSTANDING HARASSMENT (p. 1)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 1)

- Record the unit outcomes on the flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, re-visit the outcomes.

From the explanation of the unit outcomes, proceed to the exercise without dealing with the content covered. This is meant to allow the participants to begin to challenge their thinking about the subject of harassment.

Categorise the following examples in terms of whether they represent sexual harassment, harassment, gender harassment or sexual assault (page 2 of the Training Manual).

ANSWERS TO EXERCISE (p. 2)

1. **Accidentally bumping against a co-worker's shoulder.** None. Just an innocent mistake.
2. **I cannot understand how you people think!** This can be construed as harassment if the speaker belongs to a different race/gender than the "you people". Otherwise, if the speaker and "you people" belong to the same race/gender this can be an indication of snobbishness. This is because the moment one refers to others as "you people" there is a connotation of "us-them" with "us" often assumed to be better than "th~m".
3. **If you want to go places, stick with me and be a good girl.** Sexual harassment if it means "do as I say if you want to advance in your career".
4. **Can't you get this through your thick skull, you b****.** Gender harassment.
5. **I cannot get you out of my mind. I can just imagine how it would be to be with you.** Sexual harassment.
6. **If you do not (you know) with me you may as well forget about that promotion.** Sexual coercion.
7. **Do not play games with me. You know what I want.** Sexual coercion.
8. **Receiving a sexually explicit SMS message or e-mail from a male colleague.** Sexual harassment.
9. **One day it will be just you and me and I will show you!** Threat of sexual assault.
10. **Being touched by a colleague who, as matter of habit, is "touchy."** If this has no sexual innuendo and he/she has not been warned before about the undesirability of touching, no big deal.



LEGAL FRAMEWORK AGAINST HARASSMENT (p. 2)

- Read the relevant excerpt from the Constitution.
- Read the relevant excerpt from the Employment Equity Act.

PRACTICAL EXERCISE (p. 2)

Think of possible examples in the workplace that can be an indication of harassment based on the grounds listed in the manual.

- Record the examples given by participants on the flip chart.
- Allow the group to determine the correctness of the example.
- Where there is unanimous agreement and the group is correctly in agreement, allow no further discussion.
- Where there is no agreement, allow for a brief discussion. Make a ruling by referring to the examples given below.

EXAMPLES:

Religious grounds: "You Moslems/Hindus/Shembes/ZCC/Catholics are very difficult to work with."

Pregnancy: Ms B cannot represent the school in the regional competition. She is pregnant. Or

"I do not want to hear another word. Since becoming pregnant you complain about everything."

Marital status: "Single females are unreliable."

Disability: "I always get irritated if I have to work with D (visually impaired) on a project. He is so slow. I have said this before and nobody wants to listen."

Ethnic and social origins: "Trust a Xhosa / Zulu/ Afrikaner/English etc. to do that!"

Age: "How can you entrust Mr. Y with such a responsibility; don't you realise he is senile."

Sexual orientation: "How can you assign Ms. L to supervise the girls during a field trip? Don't you know she is lesbian!"

How common are such incidents of harassment in your workplace?

Allow a brief discussion about the extent to which these are common.



UNIT 2:

ATTITUDES AND BELIEFS THAT PREVENT SEXUAL HARASSMENT FROM BEING TAKEN SERIOUSLY (p. 3)

FACILITATOR'S INPUT

UNIT OUTCOMES (p. 3)

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, re-visit the outcomes.

BELIEFS THAT PROMOTE HARASSMENT (p. 3)

Rights, as provided for by the Constitution and other pieces of legislation, do not change attitudes or beliefs. That is why all forms of harassment continue to happen even in the existence of these rights are guaranteed. Furthermore, some perpetrators harass other people as a matter of habit.

FACILITATOR'S INPUT

Invite the participants to contribute additional examples.

EXERCISE (p. 3)

Think of the various diverse groups that are present in your work environment from the perspective of both employees and learners. Look at the list of examples of behaviour listed in the manual, and determine whether individuals coming from some cultures could construe such behaviour as having sexual connotations or whether the behaviour generally reflects sexual harassment.

FACILITATOR'S INPUT

Emphasise that the responsibility of each person in the workplace is to determine:

- What is the expected professional conduct?
- What makes colleagues feel uncomfortable?
- What behaviour is generally acceptable?
- What behaviour reflects respect and positive regard for colleagues?

Before you act, make sure that your action complies with all these aspects as a way of contributing to a harmonious working environment.





TRAINING MANUAL (pp. 4-5).

Inclination to touch colleagues
Tendency to come too close
Tendency to stare
Tendency to respond to stares by looking down
Display of a bare breasted picture of a woman in traditional attire
***Display of pin-up pictures
Asking for a date

EXPLANATORY NOTE

***Definitely in bad taste and offensive, such behaviour has no place in a setting with professional ethics.

Most of these examples of behaviour in and of themselves do not constitute harassment. They only become harassment if they continue despite the recipient's protest about the undesirability thereof!

REGULATING ATTRACTION BETWEEN TWO PEOPLE (p. 5)

There is a distinct difference between consenting adults finding themselves attracted to each other, and sexual harassment. In the case of attraction, one party initiates a discussion in that regard. The other party either declines or encourages the advances.

In the case of sexual harassment, the sexual advances are unwanted and unwelcome, and as such, they should not be confused with attraction. At the root of sexual harassment is abuse of power to gain sexual favours.

SELF AFFIRMATION (p. 5)

Use the self-affirmation statements if you have some doubts about your rights in responding to sexual advances.

- Identify the issue that you have a problem dealing with.
- Repeat these self-affirmation statements over and over again to modify your counter-productive self-talk.



UNIT 3:

CROSS-CULTURAL DIFFERENCES IN BEHAVIOUR THAT MAY BE CONSTRUED TO HAVE SEXUAL CONNOTATIONS (p. 6)

UNIT OUTCOMES (p. 6)

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, re-visit the outcomes.

FACILITATOR'S INPUT

The differences between African and Western cultures are listed in the next section. Invite participants to share their own understanding first, and revert to the list on page 8 of the Training Manual only if participants are not responding.

Make sure participants understand these differences by inviting them to give examples.

List examples.

Record the examples on the flip chart.

Discuss only those examples that do not illustrate the point, highlighting why that is the case.

CASE STUDY: (p. 7)

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 where you feel that it 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 pre-school 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 at the front seat. You have travelled with him in the past.

WHAT DO YOU THINK IS THE PROBLEM?

A possibility exists that in the course of your previous travel with him you did what has become habitual, i.e. restrained him like your pre-school child when applying brakes. This may have left him questioning your motives and not exactly knowing how to deal with the situation. Hence his decision to avoid you.

HOW WOULD YOU TACKLE IT?

Call him and indicate to him that you have noticed that he tends to avoid you, and explain what you think the reason is, and describe to him that this is a habit you developed because of travelling with your pre-school child. Acknowledge that some people find it amusing while others find it offensive. Indicate to him that you are trying to kick the habit and if it makes him feel better he is welcome to sit at the back when travelling with you! Work out a long-term plan to kick the habit, e.g. by making sure that your pre-schooler sits at the back of the car where it will be impossible to restrain her.





UNIT 4:

HANDLING SEXUAL HARASSMENT WHEN YOU A VICTIM *(p. 8)*

UNIT OUTCOMES *(p. 8)*

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, re-visit the outcomes.

Go over the steps highlighted in the manual, making sure that you cover the hints elaborately (pp. 8–10).

Deciding on the course of action to take is crucial. It involves some soul searching and answering the question: "How far am I prepared to go?"

It does not advance the fight against all forms of harassment by deciding to take the matter up only to withdraw later on. Rather, think carefully up-front, and when you pursue any action, make sure you are psychologically prepared to go all the way! Open a brief discussion on factors and attitudes covered in the previous unit that influence the victim's decision to take action.

ROLE-PLAY *(p. 10)*

Allocate 15 minutes for this exercise.

Let the participants do the practical exercise only after going over the material covered on pages 10 – 16.

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 for a lack of interest in this regard, he continued in this manner.

Plan to confront the issue

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



1. PLANNING TO CONFRONT THE ISSUE (p. 8)

1.1. Checking your own understanding

Ask yourself the following questions, as their answers will determine whether:

- The behaviour can be construed as harassment.
- Whether it is harassment of a sexual nature.
- Whether action needs to be taken.

QUESTION	ANSWER
Has this behaviour happened before?	The direct nature of this behaviour has not happened before, although I have always been uncomfortable with the way he stares at me.
Are there other possible explanations for this behaviour?	I am afraid not. His body language and verbal utterances definitely had a sexual connotation, and his questions constituted invasion of my privacy.
Is this happening to me only or have I witnessed the perpetrator behaving in similar ways with other people?	I am not aware of other people who have experienced the same.
How do I feel about this behaviour?	Humiliated, embarrassed, and my dignity and privacy violated.
What is the context, i.e. could the context justify the behaviour, e.g. period of excitement.	No.
Is there a logical reason for the behaviour? For example, the boss coming around your desk because stacks of boxes in front of your desk prevent him from approaching you from the front.	No.
What is your interpretation of the situation?	Definitely Sexual Harassment.



MAKE DETAILED NOTES ABOUT WHAT HAPPENED, GIVING FACTS IN DETAIL.

- First, the district official came too close and I felt uncomfortable.
- Indicated my discomfort by leaning backwards until I literally had my back against the wall.
- The district official made a joke that he does not bite.
- I tried to get out of that situation by trying to move, but before I could do so, another official came and took the seat that I would have occupied.
- He asked me whether I was married and suggested that, "if you are, your husband is a lucky man!"

DESCRIBE HOW THIS MADE YOU FEEL

- I felt humiliated.
- I felt embarrassed.
- I felt that my dignity was violated.
- I felt cheap.

PHONE THE DISTRICT OFFICIAL TO REQUEST A MEETING

Greet the district official politely and indicate that you would like to make an appointment to discuss what happened in the meeting of such and such. After securing an appointment, thank the official politely.

PREPARE FOR THE MEETING

- Go over your notes.
- If you are comfortable about confronting the issue, there is no need for step 4.

WHAT IF YOU GET "COLD FEET"?

Using your notes, role-play the session with a trusted confidante and repeat the self-affirmation statements. However you feel, please do not withdraw or cancel the appointment. Remember that you have a responsibility to keep the Constitution alive by asserting your rights. You also have a responsibility to love yourself enough to protect yourself from all forms of abuse, including sexual harassment.

ROLE-PLAY OF THE MEETING WITH DISTRICT OFFICIAL

Yourself: "Good morning Mr. Y, thank you very much for affording me the opportunity to meet with you."

Mr. Y: "It is always a pleasure to see your pretty face. How can I miss that opportunity? What can I do for you?" Looks at you with searching eyes

Yourself: (Feel doubtful whether this is the right thing to do/or whether what happened warrants the trouble.)

REPEAT SELF-AFFIRMATION STATEMENT TO YOURSELF:

"I have to do this because if I ignore this behaviour, it will not go away." Take a deep breath and say:



"Actually, I would like to talk about your behaviour at the last meeting." Describe the behaviour in detail.

Mr. Y: "Oh, you have come all the way just about that? You sure must like to see me!"

YOU: " I have come to talk about that because it is important to me. I will also appreciate not being interrupted."

Mr. Y: " Okay, okay I get the picture."

YOU: (Describe the behaviour in detail while maintaining steady eye contact that communicates confidence and conviction. Avoid fidgety behaviour.)

- First you came too close to me and I felt uncomfortable.
- I indicated my discomfort by leaning backwards until I literally had my back against the wall.
- You made a joke that you do not bite, much to the amusement of other district officials and principals.
- I tried to get out of that situation by trying to move but before I could do so another official came and took the seat that I would have occupied.
- You asked me whether I was married and suggested that if I was, my husband was a lucky man!

YOU: (Describe how this made you feel)

- I felt embarrassed.
- I felt that my dignity was violated.
- I felt cheap.
- I felt humiliated.

Mr. Y: "I am not exactly sure why you are telling me all this."

YOU: "I am telling you this for two reasons:

1. So you know how I experienced the whole thing and to hear from you what you have to say about this.
2. Warn you that this behaviour has to stop, because if it does not, I will take further steps."

Mr. Y: "I really did not mean it that way. In fact, I never even felt or thought of it that way. That I find you attractive is no lie, but since I now understand how you feel about the whole thing, I promise it will not happen again!"

YOU: "I am glad that we at least have reached an understanding on this matter. It is my hope that there will be no need for a similar conversation again. Should this happen again, I will be left with no option but to make a formal complaint. Thank you for your time and goodbye!"



FOLLOWING A LETTER WRITING OPTION (p. 11)

Follow all the steps described above. Should you feel overwhelmed by the prospect of facing the perpetrator, write a letter instead of making an appointment to see him. The advantage of a letter is that it often constitutes a written record. It is important to carefully consider both the content and the tone of the letter in the interest of giving the alleged facts.

NOTE: This letter serves mainly the following purposes of:

- Informing the perpetrator that the behaviour is unwanted.
- Describing how the behaviour makes you feel.
- Determining the perpetrator's response.
- Stating what you are going to do if the behaviour does not stop.



UNIT 5:

LODGING A FORMAL COMPLAINT *(p. 12)*

UNIT OUTCOMES *(p. 12)*

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, re-visit the outcomes.

FACILITATOR'S INPUT

Sexual harassment is by definition unwanted sexual advances. Unless it is brought to the attention of the perpetrator that the sexual advances are unwelcome, operate on the assumption that the perpetrator has no way of knowing that his/her sexual attention is unwanted. It is therefore incumbent upon the victim to start by informing the perpetrator that:

- His/her behaviour is interpreted by the victim as having sexual connotations.
- The behaviour is unwanted.
- The behaviour must stop.

DEALING FORMALLY WITH HARASSMENT *(p. 12)*

Whether you opt for dealing with harassment formally or informally, the starting point is the same. The alleged perpetrator must be told that the behaviour is construed as having sexual connotations and is unwanted. Instances where a formal route is warranted:

- If the behaviour persists after the perpetrator has been informed that his/her behaviour was unwelcome.
- If the first-time behaviour constitutes gross misconduct, e.g. fondling, groping, touching, caressing, lurid gestures, etc.

WHAT IF THE PERPETRATOR IS THE LINE MANAGER? *(p. 13)*

Sexual harassment is not about love, sexuality, interpersonal attraction, etc. It is about abuse of power to secure sexual favours. It is, therefore, most common in a subordinate-boss situation. Looked at from this perspective, the victim in adopting the formal complaint route should be offered an opportunity to approach someone else in the chain of command who will deal with the matter objectively. Such provisions are stated in the Sexual Harassment Policy.

PRACTICAL CONSIDERATIONS *(p. 13)*

Emphasise to the participants that not everything that seems like sexual harassment is indeed sexual harassment. Hence:

- The need for the complainant to first satisfy herself that the behaviour is indeed sexual harassment.
- The need for a thorough investigation in cases of formal complaints.
- The need to hear the perpetrator's side of the story.



EXERCISE (p. 13)

Suppose Ms. X had an affair with the principal. Ms X wants to end this affair and the principal does not want to accept the end of the relationship. He keeps following her, inquiring about her whereabouts, and he cannot stand to see her chatting with male colleagues. Can this case qualify as sexual harassment?

FACILITATOR'S INPUT

- Allow discussion of the matter by the big group.
- Receive input.
- Lead the group to scrutinise recorded input by asking probing questions.
- Add whatever the participants may have left out.
- Lead a discussion in the direction that looks at:
 - i. Beginning of the affair
 - ii. End of the affair.
 - iii. Behaviour of the principal upon termination of the affair.

LEAD THE DISCUSSION TO FOCUS FIRST AT THE BEGINNING STAGES OF THE AFFAIR

- Affair between consenting adults.
- Error of judgement on the side of both parties.
- Do not mix duty with pleasure because you still need to deal with each other professionally beyond the affair.
- No sexual harassment.

LEAD THE DISCUSSION TO FOCUS AT THE END OF THE AFFAIR

- Parties to a consensual relationship have a right to begin/end relationships.
- Break-up often hurts at least to one party – accept it with grace.
- People have a right to initiate and a right to end relationships.
- Party on the receiving end should be mature enough to realise this.
- Behaviour of the principal at the end of the relationship constitutes sexual harassment.
- Can be construed as stalking.



EXERCISE (p. 13)

The HoD had an affair with a young female teacher before the teacher joined the school. The affair continued after she joined. All has been going well until the HoD decided to marry someone else. The scorned female teacher then decided to file a sexual harassment complaint against the HoD.

UNDER WHAT CIRCUMSTANCES CAN THIS CASE BE A LEGITIMATE SEXUAL HARASSMENT CASE?

FACILITATOR'S INPUT

- Allow discussion of the matter by the big group.
- Receive input.
- Lead the group to scrutinise recorded input by asking probing questions.
- Add whatever the participants may have left out.
- Steer the discussion in the direction that looks at both perspectives, i.e. the HoD as the perpetrator or the female teacher as the perpetrator.

ANSWER:

SCENARIO 1

The complaint by the female teacher may be a vendetta against the HoD for having jilted her. This is a case of using sexual harassment for own agenda. The HoD suffers, not because he is the perpetrator, but because of his error of judgement in starting the affair in the first place.

The female teacher abuses the sexual harassment agenda to advance her own personal interest, i.e. getting even with the HOD who dumped her.

IN THIS SITUATION, NO ONE IS A WINNER. THE FALSE ALLEGATIONS WILL BE UNCOVERED IF A THOROUGH, IMPARTIAL INVESTIGATION IS CARRIED OUT.

IMPLICATIONS:

- Embarrassment of the complainant.
- Injustice to the course of eradicating sexual harassment in the workplace.
- Possible humiliation of the complainant.

SCENARIO 2

The HoD may have offered the lady teacher preferential treatment and privileges during the course of the affair, which he has since withdrawn. The complainant may have reached a point where she feels entitled to these privileges, and she construes withdrawal of such privileges as a form of punishment.

An impartial investigation is likely to uncover this and there is no winner in this situation either because:



IMPLICATIONS

- Privileges that the female teacher may have enjoyed as “perks” for having an affair with the HoD will be withdrawn.
- The HoD may face disciplinary action for privileges extended to “girlfriend”.
- Instances like this one trivialises the sexual harassment agenda.

EXERCISE (p. 14)

You think that a senior official in the regional office is winking at you. You are not quite sure of his behaviour as he is new and you are not accustomed to how he normally behaves.

Nevertheless, you feel uncomfortable because of what you perceive to be “making eyes at you”. On one odd occasion, he asked you a question that you felt was “personal”. What should you do to:

Check you own perceptions.

Deal with the matter after checking the accuracy of your perceptions.

CHECK YOUR OWN UNDERSTANDING

ABOUT PERCEIVED WINKING

- Is he winking at me or could it just be an irritating habit?
- Observe the behaviour closely when he interacts with you as well as when he interacts with others.
- Check your own perception with someone you trust, who has interacted with the senior official in question.
- If the finding is that this is just an irritating habit, forget what you felt and be prepared for future encounters.
- If it happens to you alone, and other colleagues have not noticed such behaviour, decide on the course of action to take!

ABOUT THE PERSONAL QUESTION HE ASKED YOU

ASK YOURSELF THE FOLLOWING QUESTIONS:

- Was the question personal?
- Did the question have sexual connotations?
- Was his non-verbal behaviour sexually suggestive?
- Was this a once-off occurrence or has the behaviour persisted?
- Is this a case of being nosy or is it definitely an expression of sexual interest?
- Could it be a case of cross-cultural misunderstanding?

If the question and non-verbal behaviour had no sexual innuendoes, it is anything but sexual harassment.

If the non-verbal behaviour or question or both had sexual innuendoes, decide on the course of action to take and take action immediately



CASE STUDY 3 (p. 13)

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.

ASK THE FOLLOWING QUESTIONS

- Is the behaviour of the district official appropriate?
- Was the district official coming on to the applicant?
- Is there anything in his behaviour and utterances that can be construed as abuse of power?
- Did his behaviour or utterances have sexual connotations?
- Was his non-verbal behaviour sexually suggestive?
- Does it matter that this was a once-off occurrence?

Without any doubt, this case represents a situation where sexual favours are solicited in return for occupational advancement, in this case, being appointed. It illustrates also a blatant abuse of power. It is definitely a case of sexual harassment.



UNIT 6:

HANDLING INSTANCES OF SEXUAL HARASSMENT OF SUBORDINATES BY SENIOR LINE MANAGERS (p. 14)

UNIT OUTCOMES (p. 14)

- Record the unit outcomes on a flipchart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit the outcomes.

FACILITATOR'S INPUT

- Explain the material covered on pages 14-15.
- Allow questions for clarification.
- Allow for discussion only in cases where such discussion illustrates a point.
- Refer questions to the participants for answers.
- To reinforce the participants' understanding, answer questions only if fellow participants do not have the right answers.

ROLE-PLAY (p. 16)

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 acceded to. When 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 subordinates started spreading rumours about the complainant, saying that the reason why he rejected her advances was because he was gay. These rumours were so rife that they were threatening his relationship with his fiancée.

IDENTIFY PARTICIPANTS WHO WILL PLAY THE FOLLOWING ROLES:

- Alleged perpetrator
- Alleged complainant
- Manager

The rest of the participants will observe the proceedings and give constructive feedback.



STEER THE DISCUSSIONS IN A DIRECTION THAT FOCUSES ON THE FOLLOWING:

- Is there a case of sexual harassment?
- What is unusual about this case?
- What is the impact of this case in the advancement of the sexual harassment course?
- What is the impact of the behaviour of the female colleague on the well-being of the male victim?

Follow the recommended procedure to conduct an investigation into the alleged sexual harassment allegations.

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?

- Re-visit 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.





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.”

The Department of Education would like to thank Dr Octavia Mkhabela, Ms Zakhe Moshoeshoe, Ms Mamathe Kgarimetsa-Phiri and Ms Kiki Zazayokwe for developing the training materials.

The Department of Education would also like to thank the provincial gender focal people and educator unions who contributed to the development of the training materials, for their valuable comments, and also the women managers and leaders in the nodal areas who provided valuable information during the needs assessment process.

Equally, the Department of Education wishes to express its gratitude to the Government of Sweden which, through the Swedish International Development Cooperation Agency (Sida), provided the funding for the development of these training materials.



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.
- Module 3: 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: WOMEN IN AND INTO MANAGEMENT AND LEADERSHIP POSITIONS AND THE LAW

This module purports to inform women in and into management and leadership positions of the legal framework within which education operates. The module attempts also to highlight the rights that women leaders have as employees, which they should assert.

The module situates the South African legal framework against the background of international and regional commitments in addition to the specific laws applying to the field of education, the module covers areas of common law, labour laws as well as laws protecting the rights of children.

It is premised in the module that sensitivity to legal issues is not a luxury, but a necessity for every woman manager who is to execute her managerial responsibilities effectively.

Due to the changes that are ever-present in the legal environment, it is crucial that the women managers in education inculcate a habit of keeping abreast of legal developments in the form of amendments.

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:



= 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.



Table of contents

Introduction	1
Broad aims of the module	1
Outcomes	1
Underlying assumptions	1
Acronyms used in the module	2
 Unit 1: International and Regional Commitments to Gender Equality as Tools for Women	3
Outcomes	3
Discussion	3
International labour standards for women workers	3
What are labour standards?	3
Why set international labour standards for women managers and leaders?	3
International and regional commitments	4
Beijing Platform of Action	4
Convention of the Elimination of all Forms of Discrimination against Women	4
Regional Initiatives on gender equity (SADC)	4
How women can use international and regional commitments and labour standards in management and leadership positions	
Awareness creation	6
Empowerment of women	6
 Unit 2: National Context for Women in Management and Leadership	7
Outcomes	7
The South African Constitution	7
Rights of women managers and leaders	7
Fundamental rights and freedoms	8
National machinery on the advancement of women	9
Commission on gender equality	9
Office on the status of women	9
Gender Focal Point	9



Table of contents *continued...*

Unit 3: Generic legislation affecting the role of women managers and leaders in Education	11
Outcomes	11
The complexity of the legal and policy environment within which women managers find themselves	11
Women managers and Common Law	11
Exercise: Example of behaviours regulated by Common Law	11
Women managers and leaders as co-custodians of learners	12
The rights of learners	12
Education is a right	12
Freedom from all forms of discrimination	12
Right to administrative justice	12
Right to name and nationality	13
Right to opinion and participation	13
Freedom of beliefs and culture	13
Protection from violence	13
Family life	13
Health and welfare	13
Child labour	13
Homeless children	13
Tips	14
Women managers and public servants who are non-educators	14
Case study	15
 Unit 4: Legislation Regulating the Education Environment	16
Outcomes	16
The role of women managers in relation to the role of the SGB	16
Women managers and leaders and basic financial management in education	16
The woman manager as a custodian of discipline within her sphere of influence	17
Case Study	17
Tips	17
Women managers and leaders as employers representing the Department of Education	18
Women managers and then professional management of schools	18
Women managers as representatives of employers of educators	18
Women managers and their role in the management and development of human resources in education	18
Women managers and their role in ensuring the occupational health and safety of all employees	19
Women managers and leaders as employees in the DoE	19



Table of contents *continued...*

Women managers as juristic persons	19
Conditions of Service in Education	20
Appointments, promotions and transfers	20
Labour relations	20
Unfair labour practices	21
Exercise	21
Gender and equality within the Department of Education	22
Protection against discrimination	22
Equitable educational opportunities	22
Mandatory registration of education	22
Ethics and Values in Education	
What are ethics?	23
What are values	23
Exercise	23
Case Study	25
Policies applicable to the field of education	
Religious policy of DoE	25
Language in education policy	25
HIV/AIDS and policy on STIs	25
Exercise	26
Conclusion	26
References	27
Annexure 1	27
Annexure 2	27
Annexure 3	27
Annexure 4	27



INTRODUCTION

It has become essential that employees and employers should have a basic knowledge of the laws governing their relations and actions. This does not imply that we should all become lawyers. Women, particularly those in education management and leadership positions, need to keep abreast of the legal requirements applicable to the education sector in general. They should aim at broadening their knowledge by understanding the legal framework within which education operates. Furthermore, managers in education find themselves as representatives of the employer while they themselves are employees. As such, they need to develop sensitivity towards protecting the rights of their subordinates while asserting their own rights.

BROAD AIMS OF THE MODULE

This module introduces a legal framework that will look at the interactions amongst:

- External environment, i.e. international and regional issues that form a context for women management and leadership.
- Internal environment, i.e. the South African education regulatory system.
- The role of educational managers and leaders in relation to laws and policies that are meant to bring about stability and consistency to educational management.
- The rights of learners, parents and the community served by the schools.

OUTCOMES

Having completed this training module, women managers should:

- Understand and appreciate legal prescripts and know the regulations guiding their activities.
- Exercise their own rights and respect the rights of others.
- Make better decisions within the framework of the law.
- Act in such a manner as to prevent unnecessary litigation against the Department of Education.
- Have knowledge of the international, regional and national commitments to gender equality.

UNDERLYING ASSUMPTIONS

This module is based on the following underlying assumptions:

- The principles of the legal framework within which women managers and leaders operate affect their tasks and functions.
- The more women managers understand the legal environment in which they operate, the more successful they will be as managers.
- Ignorance of the law within school management and leadership is no excuse for ineffective school governance.



ACRONYMS USED IN THE MODULE

ACRONYM	FULL TITLE
BCEA	Basic Conditions of Employment Act
CCA	Child Care Act
CEDAW	Convention for the Elimination of all forms of Discrimination against Women
CGE	Commission for Gender Equality
DoE	National Department of Education
EEA	Employment Equity Act
EE(A)	Employment of Educator's Act
GAAP	General Accepted Accounting Practices
GFP	Gender Focal Point
ILO	International Labour Organisation
LRA	Labour Relations Act
NEPA	National Education Policy Act
NGOs	Non-Governmental Organisations
PFMA	Public Finance Management Act
PSA	Public Service Act
OHSA	Occupational Health and Safety Act
SADC	Southern African Development Community
SASA	South African Schools Act
WID	Women in Development





UNIT 1:

INTERNATIONAL AND REGIONAL COMMITMENTS TO GENDER EQUALITY AS TOOLS FOR WOMEN

OUTCOMES

Having completed the unit, women managers should:

- (i) Know the international labour standards that are of prime importance to women workers.
- (ii) Have gained insight into international tools (conventions and commitments) available for women managers and leaders.
- (iii) Be able to sensitise their male counterparts about the rights of women as workers.

DISCUSSION

Consider the progress made in post-apartheid South Africa to advance the interests of women in the workplace.

INTERNATIONAL LABOUR STANDARDS FOR WOMEN WORKERS

What are labour standards?

- Labour standards provide a framework on workers' rights.
- They outline policy issues relating to women workers.
- They attempt to address the constraints faced by women workers.
- They address women's basic rights.

Why set international labour standards for women managers and leaders?

International labour standards are important in providing best practices for women managers and leaders in their quest to promote gender equality in education employment. Gender equality in education employment can be done through:

- Redressing the current imbalances between the situation of men and that of women educators in the workplace.
- Advancing the status of women educators to a level where they can participate in and benefit on an equal footing with men.



WOMEN MANAGERS AND LEADERS SHOULD BE AWARE OF THE FOLLOWING INTERNATIONAL LABOUR STANDARDS:

The international labour standards determined by the International Labour Organisation (ILO)

Equal remuneration

Equal pay for men and women for work of equal value.

The promotion of equality of opportunity and treatment

This calls for all measures to end all forms of discrimination.

Workers with family responsibilities

Workers responsible for children other than their immediate family often find it difficult to balance their work with their family responsibilities. This restricts their full participation in employment activities.

Maternity protection

Twelve weeks of maternity leave with entitlements such as benefits and medical care are minimum provisions for women responsible for caring for their children.

INTERNATIONAL AND REGIONAL COMMITMENTS ON GENDER EQUALITY

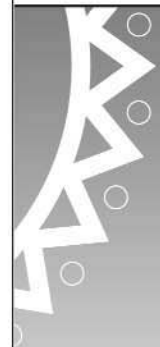
(i) Beijing Platform for Action

The 1995 Beijing conference on women has resulted in a Platform for Action being adopted by participating countries. This sets parameters for monitoring and evaluating the protection and advancement of women world-wide. It has twelve areas of concern on women's issues, including the Beijing +5 process, which requires countries to report on the Beijing Platform for Action at the United Nations, New York. In 2000, five years after Beijing, a review of the Beijing Platform of Action of various countries was done at the United Nations. The prevailing consensus is that while South African laws and policies adequately deal with the protection of women's rights, there still is a lack of effective implementation systems that should ensure that women in general benefit from those laws.

(ii) Convention on the Elimination of all forms of Discrimination against Women

The UN General Assembly adopted the Convention on the Elimination of all forms of Discrimination Against Women (CEDAW) in December 1979. It was opened for signature in 1980 and enforced in 1981. Currently, 132 countries have ratified it. The South African government ratified this convention in 1998.

The Convention is a comprehensive bill of rights for women. It has integrated concerns relating to the fundamental rights and freedoms of women and is based on the principle of equality between women and men. It mandates rights of women through the legislative process where accountability for the guarantee of these rights can be drawn.





(iii) **Regional initiatives on gender equity (SADC)**

The principle of equity forms one of the major cornerstones of the Southern African Development Community's treaty, and member states undertake not to discriminate against any person based on gender.

Historically, NGOs in all SADC countries took the lead in raising awareness of the injustices of the situation of women and the need to put in place policies, strategies and programmes to address gender inequalities. As a result, most SADC member states now have policies on gender or women in development (W-I-D) that identify women's empowerment and gender mainstreaming as key strategies towards the achievement of gender equity.

The SADC Secretariat, in collaboration with national gender agencies, NGOs and other stakeholders, developed and worked towards the adoption of a policy and institutional framework for gender mainstreaming in the SADC. In February 1997, the institutional framework for gender in SADC was adopted. The SADC Gender Unit was established in 1998. A plan of action for gender initiatives as well as a policy framework was developed for SADC countries.

AREAS OF LABOUR COVERED BY THE INTERNATIONAL LABOUR STANDARDS FOR WOMEN WORKERS

CEDAW ARTICLE	RELATED ISSUE IN EDUCATION	HOW IT AFFECTS ME AND MY ROLE
Women's rights		
Discrimination		
Policy measures		
Affirmative Action		
Sex roles, attitudes and prejudices		
Women in education		
Women in decision-making positions		
Rural women		
The girl child		
Gender-based violence		



HOW WOMEN CAN USE INTERNATIONAL AND REGIONAL COMMITMENTS AND LABOUR STANDARDS IN MANAGEMENT AND LEADERSHIP POSITIONS

AWARENESS CREATION

Women managers can disseminate information on the commitments and standards to sensitise other educators, their communities at large and in particular, their male counterparts on women's issues. This can be done through formal and informal discussions, newsletters and school plays.

They can facilitate workshops to raise awareness on the importance of promoting the advancement of women within a framework of human rights.

EMPOWERMENT OF WOMEN

The Beijing Platform for Action and CEDAW can assist women managers and leaders with in education to:

- Develop indicators that will monitor and evaluate the sensitisation of educators, non-educators and both girl and boy children in schools.
- Develop, within school governance, an understanding of the role of law in promoting women's rights.
- Develop capacity in women managers that will enable them to govern schools effectively and fairly, taking into consideration international best practices.
- Identify specific legal barriers that hinder the promotion of women's rights.





UNIT 2:

NATIONAL CONTEXT FOR WOMEN IN MANAGEMENT AND LEADERSHIP

OUTCOMES

Having completed this module, participants should:

- Understand the basic provisions of the Constitution of South Africa.
- Understand what the supremacy of the constitution means.
- Understand and use the national machinery on women advancement to benefit women managers and leaders within DoE.
- Understand rights that are relevant to women managers and leaders in education.
- Appreciate constitutional rights of educators, learners and parents.

THE SOUTH AFRICAN CONSTITUTION

What is the main purpose of the South African Constitution?

- To create a new order governing the lives of the citizens of South Africa.
- To create a democratic state where all citizens can exercise and enjoy their fundamental rights and freedom.
- To create a state where there will be equality between people of all races, of differing physical abilities, of differing sexual orientation and religions and ethnicity.

The Constitution is the supreme law of the country. All other laws and acts are subject to constitutional provisions. Should any law or act deviate from the Constitution, its provisions will have no effect. Limitations on the rights governed by the Constitution may influence the exercising of a fundamental right and may infringe on someone else's rights. Fundamental rights may be suspended in a state of emergency. Constitutional rights are not absolute. Their application is further defined by other pieces of legislation. For example, the fundamental right to equality is suspended for white males by the Employment Equity Act in the interest of bringing about equity in the workplace.

FACILITATOR'S INPUT

RIGHTS OF WOMEN MANAGERS AND LEADERS

The Bill of Rights requires that women and men should have the same rights. However, gender disparities occur when these rights are violated. These disparities in turn affect the set of choices available to women in many aspects. (See exercise on p.10)



FUNDAMENTAL RIGHTS AND FREEDOMS

Consider the fundamental rights and freedoms presented below and think about ways in which they can be violated on the one hand, and ways in which they can be protected on the other hand.

RIGHT/FREEDOM	VIOLATION	WAYS TO PROTECT IT
Right to equality		
Human dignity		
Privacy		
Assembly, demonstration and petitions		
Freedom of association		
Political rights		
Access to information		
Education		
Administrative justice		
Safe environment		
Labour relations		
Freedom from abuse/ premature labour involvement		
Language and culture		





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.

LIST THE DIFFERENT TYPES OF INFORMATION THAT THE CGE CAN PROVIDE. THINK ABOUT HOW YOU CAN USE THIS INFORMATION AS A WOMAN MANAGER IN EDUCATION.

(ii) Office on the Status of Women

Amongst others, the functions of the OSW are to:

- Advance a national women's empowerment policy.
- Work with line ministries, provinces and all publicly funded bodies in mainstreaming gender into all policies and programmes.
- Develop key performance indicators for measuring the national progress in the area of gender equality.
- Arrange for training in gender analysis and gender sensitisation.
- Facilitate awareness and build confidence amongst women at all levels.

(iii) Gender Focal Point

The most salient functions of the GFP are to:

- Ensure that gender issues are routinely considered as strategic issues.
- Assist the departments in reflecting on gender considerations in their business plans and reports.
- Provide gender-disaggregated data in their work.
- Ensure that each department implements and receives advice on the national gender policy.
- Monitor and evaluate departmental projects and programmes on gender.



THINK ABOUT THE ROLE OF THE GENDER FOCAL POINT IN EDUCATION AT NATIONAL AND PROVINCIAL LEVELS. LIST

1. What the GFP has done to date.
2. What it ought to do.
3. Suggest what it should be doing to enhance the position of women managers in education.

WHAT GFP HAS DONE	WHAT GFP OUGHT TO DO	OTHER WAYS GFP CAN ENHANCE THE POSITION OF WOMEN MANAGERS IN EDUCATION



UNIT 3:

GENERIC LEGISLATION AFFECTING THE ROLE OF WOMEN MANAGERS AND LEADERS IN EDUCATION

OUTCOMES

Having completed the unit, participants should:

- Understand the legal provisions protecting the rights of women managers, educators, non-educators and learners.
- Understand, appreciate and apply their rights as representatives of a Head of Department.
- Understand and assert their rights as employees of the department.
- In their dealings with colleagues and subordinates, understand and respect their rights.

THE COMPLEXITY OF THE LEGAL AND POLICY ENVIRONMENT WITHIN WHICH WOMEN MANAGERS FIND THEMSELVES

Women managers in education have to negotiate their way through a maze of legislation that they are required to observe, ranging from common law to highly specific legislation relating to education. As such, women managers should always be conscious of the possible legal implications of their actions.

WOMEN MANAGERS AND COMMON LAW

Over and above policies and procedures prescribed by DoE, managers operate in an environment regulated by Common Law, which, as adults, they ought to be aware of. This implies that in the absence of specific policies relating to common interpersonal/property and other general matters, Common Law prevails. For instance, in the education enterprise, there may not be a specific policy regulating behaviours like stealing, assault, defamation, etc. as these are regulated by Common Law.

EXERCISE

EXAMPLES OF BEHAVIOURS REGULATED BY COMMON LAW
.....
.....
.....
.....
.....
.....
.....
.....
.....
.....



WOMEN MANAGERS AND LEADERS AS CO-CUSTODIANS OF LEARNERS

Learners are legal subjects and to understand learners as a woman manager, you have to understand the nature of children and their legal entitlements. The law treats and perceives children differently from adults. The law recognises the uniqueness of the nature of a child. Children have limited capacity to deal with challenges facing them. They have minimal levels of emotional maturity. They are not as self-controlled as adults. Children's mental capacities are still developing. They also have rational thought and behaviour that is not as developed as adults. Because of this, the law restricts the contractual capacity of children. This means that children cannot enter into legal contracts.

Section 32 of the South African Schools Act explains what the status of learners, as minors, should be in relation to their participation in the governing body.

- A member of a governing body who is a minor may not contract on behalf of a public school.
- A member of a governing body who is a minor may not vote on resolutions of a governing body, which impose liabilities on third parties or on the school.
- A member of a governing body who is a minor incurs no personal liability for any consequence of his or her membership of the governing body.

The law limits the capacity of children to perform certain legal functions.

THE RIGHTS OF LEARNERS

In your capacity as a woman manager in education, you need to know the rights of children in order to ensure that they are not violated in the course of managing the learning process.

EDUCATION IS A RIGHT

All children have the right to free and equal, non-racial, non-sexist and compulsory education. Education is a right and not a privilege. Learners have a right to basic education. The South African Schools Act regulates the admission of learners to schools. A public school must admit learners and serve their educational requirements.

FREEDOM FROM ALL FORMS OF DISCRIMINATION

All children have the right to protection. They should not be discriminated against because of their parents or families' colour, race, gender, language, religion, personal or political opinion, nationality, disability or for any other reason. No learner may be refused admission to a public school on the grounds that his or her parent is unable to pay or has not paid the school fees determined by the governing body under Section 39.

RIGHT TO ADMINISTRATIVE JUSTICE

South African Schools Act (SASA) prescribes that schools should have "the code of conduct that reflects the responsibilities of learners. Owing to the fact that learners are minors represented by law through their parents, the parents' responsibility and commitment to the learners' code of conduct should be part of such a code. It should be clear as to what constitutes misconduct of a lesser nature and serious misconduct should be dealt with as contemplated in section 9(3) of the Act. The due process to be followed in dealing with disciplinary matters must be clear and the principles of natural justice must be adhered to."



RIGHT TO A NAME AND NATIONALITY

All children have the right to a name and nationality as soon as they are born.

RIGHT TO OPINION AND PARTICIPATION

All children have the right to express their own opinion and the right to be heard in all the matters that affect their rights and protection and welfare.

FREEDOM OF BELIEFS AND CULTURE

All children have the right to practice their own religion, culture or beliefs without fear.

PROTECTION FROM VIOLENCE

All children have the right to be protected from all types of violence, including physical, emotional, verbal, psychological, sexual, state, political, gang, domestic, school, township and community, street, racial, self-destructive and all other forms of violence.

FAMILY LIFE

All children have the right to a safe, secure and nurturing family and the right to participate as a member of that family.

HEALTH AND WELFARE

All children have the right to adequate health care and medical attention both before and after birth.

CHILD LABOUR

All children have the right to be protected from child labour and any other form of economic exploitation, which endangers their mental, physical or psychological health and interferes with their education so that they can develop properly and enjoy childhood.

HOMELESS CHILDREN

No child should be forced to live on the streets or forced to return home if his/her basic rights will continue to be violated. However, homeless children who do have a home should be encouraged to return home.



RIGHT/FREEDOM	WHAT I NEED TO DO TO PROTECT THIS RIGHT
Education	
Freedom from discrimination	
Name and nationality	
Right to opinion and participation	
Freedom of beliefs and culture	
Protection from violence	
Family life	
Health and welfare	
Child labour	
Homeless children	

TIPS

- As a woman manager, you are required by law to safeguard the interest of learners.
- There are many challenges that face women managers in this regard.
- In most schools, the situation may require that you assume the role of parents. Many parents are working as migrant workers, especially in rural areas.
- In other instances, educators are required to be counsellors, advisors, spiritual guides, etc.
- You need to be able to identify barriers that prohibit effective learning in schools.
- Know how to deal with alleged child abuse and other forms of gender-based violence.
- You need to be able to recognise signs of substance abuse by learners.

WOMEN MANAGERS AND PUBLIC SERVANTS WHO ARE NON-EDUCATORS

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. 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.

SECTION 30 of the Public Service Act also prescribes that unless written permission is obtained from an authorised officer, public servants are prohibited from engaging in external remunerative work.

SECTION 17 (2) prescribes that termination of services of a public servant can be due to:

- (a) Ill-health.
- (b) Abolishing of the post through restructuring.
- (c) Unfitness or incapacity.
- (d) Misconduct having followed due disciplinary process.
- (e) Employee on probation not confirmed.
- (f) Continued employment constituting a risk for the state.
- (g) Appointment to a post that falls outside of the jurisdiction of the PSA.



TIP

In instances where you are not sure of what legislation applies to which employee, contact the legal division before you act.

CASE STUDY

An applicant who has been a principal for the past 12 years was planning on going on study leave next year. A district office position was advertised for which he applied. He got the position and assumed duties, only to begin negotiations for study leave as he had already made plans and had been accepted for further studies in contact institution.

Is the request for study leave by this newly appointed district official a reasonable request?

Do you think such a request should be favourably considered and why?



UNIT 4:

LEGISLATION REGULATING THE EDUCATION ENVIRONMENT

OUTCOMES

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

- Identify relevant legislation regulating the education environment.
- Appreciate legislative parameters within which they should execute their managerial responsibilities in education.

The complexity of the environment in which the woman manager in education finds herself requires a fair degree of familiarity with the various pieces of legislation relating to education, as well as amendments. This section highlights these pieces of legislation. This list can never be exhaustive as laws get amended and new ones get promulgated. The laws are discussed in the context of management roles that women managers are supposed to perform.

THE ROLE OF WOMEN MANAGERS IN RELATION TO THE ROLE OF THE SGB

According to SASA, managers in general, and by implication, women principals, are responsible for the overall management of schools which includes:

- An obligation to run the school professionally.
- Maintenance of a standard of efficiency and effectiveness acceptable to the Department.
- Facilitation of effective management of the human resources within a school, considering all the relevant pieces of legislation.
- Taking overall responsibility for the smooth running of the school.
- Implementation of Departmental policies.
- Maintenance of discipline from the perspective of educators and staff as well as learners.

THE LEGALLY CONSTITUTED SCHOOL GOVERNING BODY HAS A RESPONSIBILITY TO:

- Ensure effective governance of the school.
- Develop and adopt a Constitution for the school.
- Develop a vision and a mission for the school.
- Determine the language policy of the school.
- Determine a Code of Conduct for learners.
- Ensure that DoE policies and regulations are followed.

The responsibility of the SGB lies mainly in the governance area.

WOMEN MANAGERS AND LEADERS AND BASIC FINANCIAL MANAGEMENT IN EDUCATION

The Public Finance and Management Act (PFMA) prescribes what women managers and managers in general can and cannot do in managing public funds. The National Norms and Standards for School Funding provide the woman manager with procedures for managing school funds effectively. The Education Laws Amendment Act of 2001 regulates the establishment of banking facilities for schools and prohibits the depositing of school funds into trust accounts. The same Act requires the School Governing Body to draw up a budget.



THE WOMAN MANAGER AS A CUSTODIAN OF DISCIPLINE WITHIN HER SPHERE OF INFLUENCE

One of the unenviable tasks of any manager is that of maintaining discipline. As the woman manager plays her role of maintaining discipline, the rights of the accused employee as enshrined in the Labour Relations Act need to be respected. Furthermore, the woman manager needs to be aware of the amendments to the Employment of Educators Act of 1998 in as far as the steps that need to be followed are concerned, as amended in the Education Laws Amendment Act of 2001.

The South African Schools Act 84 of 1996 (SASA) regulates the environment in which financial management operates. The scope of this Act includes the responsibilities of the educator, the learner and how schools should be governed and funded.

SASA regulates the management of finances within schools. The regulations are meant to ensure that all revenue, including school fees or funds, and any other school assets and liabilities, are managed efficiently and effectively. The PFMA and the Norms and Standards for Educators call for the financial aptitude and proficiency of all managers, including women managers.

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 them at schools 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 that are being violated by the events in this case study as well as the accounting officers who should be brought to book because of such violations.

TIPS

- A woman manager in her capacity as a principal has to act as an accounting officer in the management of school funds within the parameters set by the governing body.
- A woman manager, like her male counterparts, remains accountable for the financial management of the school funds.
- She has to check all journals, accounting books, bankbooks, that receipts are issued meticulously and keep up to date records of expenditure.
- Mismanagement of school funds is a serious offense. Therefore, the role of the principal as a manager of funds requires monitoring by the School Governing Body. Women managers need to empower themselves in this area by keeping abreast of developments and attending workshops, seminars, etc.
- Women managers need to establish systems and procedures for making financial decisions with the governing body within the parameters set by SASA.



WOMEN MANAGERS AND LEADERS AS EMPLOYERS REPRESENTING THE DEPARTMENT OF EDUCATION

(i) Women managers and the professional management of schools

- The South African Schools Act (SASA) imposes responsibilities on managers, including women managers, to apply professional standards in managing schools or district offices.
- Section 16(13) of SASA clearly directs that “professional management of a public school must be undertaken by the principal under the authority of the Head of Department”.
- This calls for all education managers, including women, to be aware of the provisions of SASA, and in executing their mandate to ensure that they remain within the framework of the law.

EXERCISE

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.

ACTIVITIES	RELEVANT LEGISLATION

(ii) Women managers as representatives of employers of educators

As a manager in education, you represent an employer, i.e. the Head of Department, who is the substantive employer of educators and officers. If you occupy a position of principal, you represent a public school as a juristic person, together with the Chairperson of the School Governing Body. You therefore have a responsibility to exercise due care in exercising your authority in such a manner that the substantive employer is protected from possible litigation. This necessitates that where contracts are involved, due care is exercised. When it comes to employee relations, as a representative of the employer, you need to respect the rights of the employees.

(iii) Women managers and their role in the management and development of human resources in education

The Department of Education has provided a framework within which human resources in education have to be developed and managed. It is crucial that women managers be guided in the activities by provisions stipulated in the Human Resources Management and Development Manual in Education. This is particularly the case in the areas of:



Planning for people.
Managing people.
Developing people.
Equity.
Labour relations and co-operation.

(Refer to the HRM file for details).

With regards to human resource development, it is important for women managers in education to familiarise themselves with the provisions of the Skills Development Act and the Skills Development Levies Act. These Acts should be considered in the context of the Skills Development Plan of the Provincial Department of Education, as well as DoE.

(iv) Women managers and their role in ensuring the occupational health and safety of all employees

The Occupational Health and Safety Act holds employers responsible for ensuring the occupational health and safety of employees. The woman manager in a school setting in the position of principal has a responsibility to ensure the safety of the working environment from a physical as well as an emotional point of view. The principal is also responsible for ensuring the safety of learners and as such, should be vigilant about the implementation of programmes that enhance school safety such as "Adopt a Cop" and the overall provisions of the School Safety Programme.

(v) Women managers and leaders as employees of the Department of Education

The same Acts that legislate education and guide women managers and leaders as employers protect them also as employees of the department.

To avoid duplication, only aspects not already covered are dealt with in this section.

(vi) Women managers as juristic persons

A public school has legal capacity to perform certain functions. As a legal entity it can sue and be sued.

Section 15 of SASA states that "every public school is a juristic person, with legal capacity to perform its functions in terms of the Act." This is reinforced by the stipulation of the Employment of Educators Act, which imposes the responsibility to employ persons in the service of a school on a public school. A public school can, therefore, establish posts for and employ educators (SASA Section 20(4)). A public school may also establish posts for and employ non-educators (SASA Section 20(4)). For the posts that it has established, the school becomes an employer, subject to the provisions of the Labour Relations Act as amended, when it comes to regulating employee relations.

Women managers and leaders who hold the position of principal of a school or district manager, have delegated authority to perform certain functions on behalf of the Department when they act on behalf of public schools.



A number of amendments have been made to the SASA of 1998 and these are captured as Act No. 57 of 2001: Education Laws Amendment Act 2001. It is absolutely necessary that women managers continue to operate within their legislated mandates by familiarising themselves with Conditions of Service in Education

CONDITIONS OF SERVICE IN EDUCATION

The ultimate authority and responsibility to determine salaries and Conditions of Service for educators rests with the Minister of Education.

All managers, women included, are responsible for influencing the process of the determination of Conditions of Service and interpreting and disseminating information on salaries and conditions set to their subordinates.

In their roles as representatives of the employer, women managers and leaders have to ensure:

- That minimum standards on the conditions of service as stipulated by the Basic Condition of Employment Act are adhered to within education.
- That the required conditions of service as cited in the Employment of Educators Act (EEA) are upheld and complied with, and report instances of transgressions.
- Ensure compliance with current HRM resolutions as well as applicable provincial resolutions.

APPOINTMENTS, PROMOTIONS AND TRANSFERS

Women managers are also expected to represent public schools in the appointment, promotion and transfer of educators and non-educators in school establishments.

In dealing with the above, they are required to take into consideration issues of equality and equity, particularly in relation to the position of women and men within the department. This requires that consideration be given to the fact that the field of education is still very much male dominated, especially at management level. A need therefore exists to create an environment that is sensitive to the gender dynamics experienced by women and take positive steps to eliminate all forms of gender bias.

SECTION 7(1) of the Employment of Educator's Act provides directives for filling of a post on any educational establishment. Under this Act, due regard shall be made to:

- Equality and equity, and any other democratic values and principles, 195 (1) of the Constitution.
- Ability of the candidate: the need to redress the imbalances of the past in order to achieve broad representation.

This section impacts on recruitment and selection processes dealt with in the Recruitment and Selection Module.

LABOUR RELATIONS

The Labour Relations Act 66 of 1995 as amended, governs labour relations and practices. This Act gives effect to the obligations relating to fair labour practices. The LRA provides a framework within which trade unions and employers can collectively bargain. It regulates:



- Organisational rights of trade unions.
- The legal effect of collective agreements.
- The right to strike and the recourse to lock out.
- The provisions pertaining to freedom of association.

UNFAIR LABOUR PRACTICES

Unfair labour relations occur when employers and unions fail to bargain in good faith. It is important for women managers to understand the implications of unfair labour practices as perpetuated by employers. Unfair labour practices occur when managers interfere with the employees' rights to:

- Organise themselves into a union.
- Bargain collectively.
- Engage in activities relating to their own protection.

Should you, as an employer, join, contribute financially or support any labour organisation to further your own interests, you are deemed to be perpetrating an unfair labour practice in terms of the Act. Unfair labour practice also includes:

- Interference with the formation or the administration of a labour organisation.
- Discrimination against any member belonging to a labour organisation.
- Discriminating against any employee because they have filed charges against you or have given any testimony against you.
- Refusal to bargain collectively with unions or other employee representatives despite the fact that the union is recognised and complies with the provisions of the LRA.

EXERCISE

Mrs. X has lodged a grievance against Mrs. K, the principal, and the SGB. Mrs. X contends that she is being overlooked for promotion each year whilst educators less qualified than her get access to better opportunities. The SGB asserts that every alternative year Mrs. X takes maternity leave and this renders her incapable of performing duties that come with the position of Head of Department on a continuous basis.

In groups, taking into consideration the fact that Mrs. K represents the Department of Education as an employer, list the actions that Mrs. K. should take to resolve the grievance in a manner that protects the interests of both the aggrieved and the Department. Indicate what steps she has to take to guide and advise the SGB's response to this.



GENDER AND EQUALITY WITHIN THE DEPARTMENT OF EDUCATION

The South African Constitution mandates equality for all.

The Constitution ensures that the fundamental rights of every one are guaranteed. In addition, all other laws in the country promote equality as they derive their basis from the Constitution.

It is on this basis that Section 4 of the National Education Policy Act (NEPA) promotes the fundamental rights of everyone in the field education.

(i) Protection against discrimination

Protection against discrimination covers the right of every person to be protected against unfair discrimination. No woman manager should tolerate being discriminated against in the Department. The Employment Equity Act 55 of 1998 promotes the constitutional right of equality in support of NEPA by:

- Eliminating unfair discrimination in the workplace.
- Ensuring that employment equity is implemented in such a way that it redresses the effects of discrimination, without causing unfair discrimination.

(ii) Equitable educational opportunities

Section 4 (C) of NEPA promotes:

- Achievement of equitable education opportunities.
- Redress of past inequalities in educational provision.
- Promotion of gender equality.
- Advancement of the status of women.

In essence, the promotion of equality between women and men aims at addressing the current imbalances between the position of men and women within the workplace. It also relates to the advancement of the status of women managers through various empowerment and capacity building initiatives.

(iii) Mandatory registration of educators

Every educator, including women managers and leaders, is to be registered with the South African Council of Educators. Section 29(1) of the Employment of Educators Act stipulates: "a person may not be appointed as an educator unless such a person is registered or provisionally registered with SACE."

Benefits of registration of educators with SACE include:

- Ensuring compliance with minimum standards.
- Promotion of the professional development of educators.
- Establishment of a code of professional ethics for educators.
- Establishment of a fair and an equitable enquiry procedure and dispute resolution process.
- Determination and enforcement of the professional ethics of educators.



ETHICS AND VALUES IN EDUCATION

(i) What are ethics?

The South African Pocket Oxford Dictionary defines ethics as a set of moral principles that guide human behaviour and conduct. Ethics are based on society's prescription of what is morally right and wrong.]

In addition to what is considered right and wrong by the society in general, professions set up their own expected standards of moral behaviour and conduct, considering their core business. A code of professional ethics for educators is therefore developed from the premise that in addition to the general societal norms and standards of behaviour, the teaching fraternity has additional requirements in terms of what is acceptable behaviour within the profession, given the responsibility of educating the nation. The code would therefore define what constitutes acceptable behaviour and conduct for professionals.

The Employment of Educators Act 7(i) defines what constitutes unethical behaviour in education. When an educator or non-educator employed by the Department contravenes provisions of the Employment of Educators Act or prejudices the administration, discipline or efficiency of the Department of Education, their behaviour is deemed to be unethical. Disobeying authority within education is also considered unethical behaviour.

This includes:

- Negligence in carrying out one's duties.
- Doing private work during the official time as prescribed by the Department of Education.
- Engaging the intervention of other people outside education for representation during a dispute.
- Behaving disgracefully, improperly or in an unbecoming manner while on duty.
- Working or teaching whilst under the influence of liquor or drugs.
- Disclosing information without the permission of the employer, be it the principal, the MEC of Education at provincial level or the Director General at national level.
- Receiving reward for duties performed without the permission of the employer.
- Misappropriating state property.
- Committing a criminal offense.
- Being absent from school or office without leave or valid reason.

(ii) What are values?

One of the prime functions of any schooling or education enterprise is the inculcation of values both directly and indirectly through the hidden curriculum.

Values are norms and principles that are determined by society and once determined, they guide our day-to-day behaviour. Values prescribe which behaviours are socially preferable, and as such, the values in our education system should reflect the democratic principles and national priorities. Values in education are founded on the Constitutional values of:



- Democracy
- Social justice and equity
- Equality
- Non-racism and non-sexism
- Ubuntu (human dignity)
- An open society
- Accountability and responsibility
- Rule of law
- Respect
- Reconciliation

Values influence our perceptions

Values imply that certain behaviours or outcomes are preferred over others. Often values are our interpretation of what is right and what is wrong and what ought and ought not to be. They form the basis of culture and are a framework to the organisational behaviour.

EXERCISE

Constitutional values are given in the first column. Indicate, by giving concrete examples, how these values manifest themselves in a school situation.

CONSTITUTIONAL VALUE	EXAMPLE OF HOW IT APPLIES IN EDUCATION
Democracy	
Social justice and equity	
Equality	
Non-racism and non-sexism	
Ubuntu (human dignity)	
An open society	
Accountability and responsibility	
Rule of law	
Respect	
Reconciliation	



CASE STUDY

Three hundred pupils found out the hard way just how serious their principal was 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 was unfazed by criticism arguing that there was no reason why learners who were 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 actions promote values that schools should uphold and whether they contribute to the promotion of the culture of teaching and learning in the short-term and long-term.

Actions you would take under the same circumstances.

Actions you would deem appropriate for entrenching the value of timeliness in schools.

POLICIES APPLICABLE TO THE FIELD OF EDUCATION

(i) Religious policy of DoE

The religious policy of DoE seeks to put into practice the Constitutional right of freedom of religion, thought, belief, and opinion, and freedom from unfair discrimination on any grounds whatsoever, including religion, in public education institutions. This, DoE is seeking to promote by adopting a religion and education policy founded on the values:

- **Equity:** The education process in general should reflect respect for the diverse cultural religious and linguistic traditions of all the people of South Africa.
- **Tolerance:** Religious education must contribute to inter-religious tolerance.
- **Diversity:** Promotes multi-religious tolerance.
- **Openness:** Schools, together with the society at large, are responsible for cultural formation and transmission and educational institutions should promote openness that seeks to refrain from any form of indoctrination.

(ii) Language in Education Policy

South Africa is a multi-lingual country and such multi-lingualism is promoted. For that reason, the Language Education Policy recognises:

- Diversity as a valuable asset.
- The promotion or fulfilment and extension of individual's language rights by means of communication in education.
- Facilitation of national and international communication through the promotion of multi-lingualism through cost efficient and effective mechanisms.
- To redress the neglect of historically disadvantaged languages in school education.



(iii) HIV/AIDS and Policy on Sexually Transmitted Infections (STIs)

The fight against HIV/AIDS is everybody's business. As such, women educators need to familiarise themselves with provisions on the government's HIV/AIDS policy, especially when it comes to non-discrimination against people infected and affected by HIV/AIDS. From an occupational health perspective, it is a woman manager's responsibility to prevent new accidental infections by adopting universal precautions against HIV/ AIDS,

EXERCISE

What does the DoE language policy mean to you as a woman manager in education in the context of integrated schools 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?

CONCLUSION

It is clear from this module that the legislative and policy environment in which a woman manager finds herself is ever changing and complex. In that regard, there is an obligation on the part of the woman manager to keep abreast of developments in the legislative and policy arena, if she is to effectively represent the employer.





REFERENCES

The Office on the Status of Women: *South Africa's National Policy Framework for Women's Empowerment and Gender Equality*.

South Africa's first progress report: *Beijing Platform of Action*.

International commitments

Beijing Platform for Action

National Institute for Public Law and Research

CEDAW training manual

Statutes

South African Schools Act 84/96

National Education Policy

Employment of Educator's Act 76/98

Employment Equity Act 55/98

Labour Relations Act of 1995 as amended

Basic Conditions of Employment Act

Occupational Health and Safety Act

Child Care Act

National Norms and Standards for School Funding

Education Laws Amendment Act of 2001

Occupational Health and Safety Act

Public Service Act

Policies and documents

Language in Education Policy

Gender Equality in Education

Gender Equity Task Team (GETT) Report

Values in Education Initiative

Framework: Human Resource Management and Development in Education 1998

Draft Policy on Religion and education

Language in Education Policy of 1997

General Accepted Accounting Practices



T

able of contents

1. Background to the module	(ii)
2. Pre-workshop diagnosis	(ii)
3. Practical considerations	(ii)
4. Practical activities	(iii)
5. Before you begin	(iii)
6. Dealing with unit outcomes	(iii)
7. Suggested time frames	(iii)
8. Practical exercises	(iv)
9. Allocation of time	(iv)
10. Follow-up activities	(iv)
11. Preface to the module	(iv)
12. Broad aims of the module	(iv)
13. Dealing with participants' expectations	(iv)
14. The structure of the facilitator's notes	(v)
15. Preface to the module	(v)
16. Dealing with Module outcomes	(v)
Unit 1: Strategy in relation to vision and mission	1
Unit 2: Strategic Planning	2
Unit 3: Operations Planning	8
Unit 4: Leading others in today's education environment	11
Unit 5: Power and influence	18
Unit 6: Leading through organisational change	20
17. Completion of the DoE evaluation forms	23
18. Conclusion: Were the workshop outcomes attained?	23



FACILITATOR'S GUIDE: STRATEGIC PLANNING AND LEADERSHIP MODULE

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, beliefs and attitudes about what women can and cannot do in the area of strategic planning and leadership.

As a facilitator, therefore, recognise that this manual is designed to be both a training manual as well as a resource book for women managers who already have knowledge and experience on the issues discussed.

Also, recognise that participants create knowledge based on their own experience, rather than mere consumers of information.

Allow the participants to reflect on their experience and to test the implications of the information provided within the facilitation process, for their own individual contexts and provincial nuances.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire and get responses before the workshop commences in order to establish what training needs should be addressed in the workshop.
- Select themes to be covered from the training manual according to the identified needs.
- Also, decide on the degree of emphasis according to the participant's prior knowledge and expectations.
- It is important that facilitators be not only skilled in facilitation but also be quite knowledgeable about the developments in the education arena.
- As a facilitator, you should study the module before the workshop so that you are reasonably comfortable with its content.
- At the end of each unit budget time for practical exercises to determine whether unit outcomes have been reached.
- Participants need to complete the Evaluation Forms at the end of each module.

3. PRACTICAL CONSIDERATIONS WORKSHOP MATERIALS

- Training Module on Strategic Planning
- Paper and pens
- Flip chart
- 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.

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.
- Learn by reflecting on personal experiences.

This means that participants will be allowed to reflect upon their experiences, share their experiences with others to promote vicarious learning, and get an opportunity to practice certain skills.

5. BEFORE YOU BEGIN

Bear in mind that:

- The needs of the participants should direct your facilitation. Therefore, do not impose your style and views
- A nurturing approach which allows participants to venture into new areas while building on their own experiences is recommended.
- In instances where participants hold counter productive views, use gentle tactics of persuasion to highlight flaws in the views they hold.
- Use an approach that builds on the strengths of participants and enhances their confidence.

6. 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 each unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

7. SUGGESTED TIME FRAMES

- Each unit will take at least a day, based on the identified themes developed from the needs of the participants.
- This module has two sections and six units. Therefore, a two-day workshop on this module is suggested, should it be necessary to cover everything.



8. PRACTICAL EXERCISES

- Encourage participants to contribute actively and critically.
- Balance facilitator input with participant involvement.
- Strive to create space for sharing new information while also actively engaging participants.

9. ALLOCATION OF TIME

- This depends on the themes/units to be covered.
- Plan for at least one-and-a-half-hour per unit across the six units.
- Use your judgement on what is to be emphasised, based on the identified needs.
- Limit the practical exercises to at least 10 minutes for group activities.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual planning within a job area.

This will be done via a questionnaire.

11. 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. Keep in mind that in dealing with any subject, there are various philosophical orientations that can be adopted. This is what enables the module to make sense.

12. BROAD AIMS OF THE MODULE

The preface covers broad aims of the module. The materials are designed around OBE principles, and due to the specificity of the outcomes, these are covered at unit level.

To encourage participant involvement right from the beginning, ask participants what they expect to get out of the workshop. Invite the participants to contribute any additional outcomes that they would like to get out of the workshop. Put these up on the flip chart. This will be handy for determining whether the workshop was successful overall.

13. DEALING WITH PARTICIPANTS' EXPECTATIONS THAT ARE NOT IN LINE WITH WHAT THE WORKSHOP IS MEANT TO COVER

- Receive participants' input without censoring it. This is meant 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 listed expected outcomes for revisiting as part of the conclusion when you will be checking whether participants feel that the outcomes were attained.



14. THE STRUCTURE OF FACILITATOR'S NOTES

Please note that only sections of the training manual that require further elaboration are highlighted in the facilitator's guide.

- Give attention to those areas in your training manual where the facilitator's input is required.
- Be adequately familiar with the content and the education environment to be able to deal with those queries that are not directly covered in the Facilitator's Guide
- In case you do not have an answer to questions asked by participants, be honest and invite other fellow participants to help.

15. PREFACE TO THE MODULE ON STRATEGIC PLANNING AND LEADERSHIP

Explain the link that exists between strategic planning and leadership using a concrete example of your choice. Alternatively use an analogy of a ship without a compass. The captain who is the "leader" in this example, has a responsibility to steer the ship in the right direction. However without a compass (strategic plan) the captain will have no way of knowing where the ship is headed. Therefore, to lead, the woman manager does need to have a clear sense of direction that is not only hers but is embraced by followers as well. In this way everybody involved knows where the ship is heading, and by implication, will know when it has detoured. Planning and leadership are therefore essential ingredients for progress in the workplace. It is even more so for women who have to play a multiplicity of roles.

16. DEALING WITH MODULE OUTCOMES

Draw participants' attention to the module outcomes and indicate that these will be re-visited as part of the workshop evaluation at the end of the module.



SECTION A: STRATEGIC PLANNING

UNIT 1:

STRATEGY IN RELATION TO VISION AND MISSION

DEALING WITH INTENDED UNIT OUTCOMES

- At the beginning of each unit highlight the unit outcomes and record them on the flip chart.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

FACILITATOR'S INPUT (p. 2).

Explain to participants that the vision is like foresight in terms of where the school, district office, provincial office, etc. is going. The mission is a statement about the reason why you exist and it touches on your core business. Your core ideology is about how you do it, in other words, incorporating things that you believe in and value. The strategic objectives is what you intend to achieve to ensure your survival. Action plans make the plan alive in terms of day-to-day activities by highlighting what needs to be done by whom and by when, in order to contribute to the achievement of the vision and the mission

EXERCISE DoE VISION (p. 3)

"Our vision is of a South Africa in which all our people have access to lifelong education and training opportunities, which in turn, contribute towards improving the quality of life and building a peaceful, prosperous and democratic society."

Invite participants to share the vision statements of their Provincial Department of Education. Record the input on the flip chart, and highlight the areas of similarity between the National and the Provincial vision statements.

DoE MISSION (p. 4)

"To provide leadership in the construction of a South African education and training system for the 21st century."

Invite participants to share vision statements of their provincial departments. Highlight the similarities.



UNIT 2:

STRATEGIC PLANNING (p. 4)

DEALING WITH INTENDED UNIT OUTCOMES

- At the beginning of each unit highlight the unit outcomes and record them on the flip chart.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

FACILITATOR'S INPUT

Emphasise the need for participants to be familiar with the various layers of strategic planning highlighting the need for an integrated approach to the process with all lower level plans feeding into the National plan.

Remind participants of the strategic objectives of the National Department of Education, i.e.

1. Making our provincial system work by making co-operative government work.
2. Breaking the back of illiteracy among adults and youths in five years.
3. Developing schools as centres of community life.
4. Ending conditions of physical degradation in South African schools
5. Developing the professional quality of our teaching force.
6. Ensuring the success of active learning through outcomes-based education
7. Creating a vibrant further education and training system to equip youth and adults to meet the social and economic needs of the 21st century.
8. Building a rational seamless higher education system that grasps the intellectual and professional challenges facing South Africa in the 21st century.
9. Dealing urgently and purposefully with the HIV/AIDS emergency in and through the education and training system.

Emphasise the link that is portrayed in the diagram on Page 5 of the Training Manual, emphasising that the various layers of strategy should feed into each other.





EXERCISE (p. 7)

The following is merely a sample of answers and participants will have their own answers, depending on the current challenges they face in their schools/Provincial Departments or Directorate in the National office.

IDENTIFY ISSUES THAT WOULD BE TYPICALLY COVERED IN THE STRATEGIC PLAN OF A SCHOOL

Improvement of pass rates
Improvement of learner enrolment
Fund-raising
Special projects, e.g. establish a sports facility, library, laboratory, etc
More parental involvement
Safer schools

IDENTIFY ROLE PLAYERS WHO SHOULD BE PART OF A STRATEGIC PLAN AT SCHOOL LEVEL

SGB led by the chairperson
Principal
Deputies
HoDs
Representative Council of Learners
Educators and other role players co-opted on the basis of expertise

Remember that the strategic planning function at a school level is the prerogative of the SGB, with the principal playing a facilitating role. The SGB can invite any other stakeholder group and co-opt individuals on the basis of expertise. Depending on the circumstances of the SGB, the role of the principal may be less or more prominent in the strategic planning process.

EXERCISE (p. 8)

SWOT

This is a sample answer as various schools/district offices/provincial offices, etc. will necessarily differ:

EXERCISE (p. 9)

Identify the macro aspects that impact on planning at national, provincial, district and school level. Explain in what way. Again, these are merely examples that the facilitator can use should the participants be unresponsive.



PREPARATION FOR STRATEGIC PLANNING (p. 9)

Do some thorough preparation prior to the start of the actual planning process.

Do not rush into the 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.

EXERCISE (p. 10)

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?

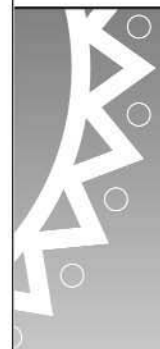
Ideally there should be a lot of time spent in preparation for the strategic planning session. This should include collation of information about:

- National priorities
- Provincial priorities
- Specific district challenges
- Contextual considerations
- Previous Plans

How implementation of previous plans was monitored

RESPONSE (p. 8)

The strategic plan should be drawn before a budget is drawn, such that the allocation of resources will necessary reflect the strategic priorities for the financial year coming. In order to align the processes of strategic planning and budgeting, it is important that once the strategic priorities are identified, the cost thereof be calculated, together with other non-financial resources that might be needed.





STRENGTHS Excellent educators Committed staff Good facilities High parental involvement Low staff turn over	WEAKNESSES Poor participation in sports Lack of motivation from learners Poverty among learners Perceptions of lack of safety
OPPORTUNITIES Possibility of making the school a centre of community life Factories being erected nearby Closer cooperation with feeder schools Start holding open days for the school Support by successful ex students	THREATS Dwindling learner enrolment Good affordable private school nearby

EXERCISE (p. 9)

Identify the macro aspects that impact on planning at national, provincial, district and school level.

Explain in what way. These are correct answers.

MACRO ENVIRONMENT	IDENTIFIED ASPECTS	HOW IT AFFECTS STRATEGIC PLANNING
Budget for Education	Priorities identified linked to the National priorities, e.g. nodal areas.	Districts falling within nodal areas: revamp their plans to accommodate strategic priorities, e.g. Dinaledi/SSIP/RMIP projects
Information age – computerisation	Provincial Departments should look at making computerisation a reality in the schools, e.g. Gauteng	The priorities of the provincial departments need to reflect via budget allocation, that computerisation in schools is a priority



FACILITATOR'S INPUT

THESE RESPONSES RELATE TO STRATEGIC PLANNING AT SCHOOL LEVEL.

How much commitment is there to the planning process?

There should be no doubts about commitment to strategic planning

Who should be involved?

All stakeholders and emphasise that although legally this is the function of the SGB, being inclusive helps in getting the buy in that is needed for the plan to work.

How do the national, provincial departments, district office or school establishment's budget fit into the strategic planning process?

This aspect is often overlooked. Unless there are resources allocated to implement the plan, there is no use in having the plan.

How much commitment is there to the planning process?

Strategic planning is a process and not an event. There is therefore a need to prepare thoroughly. Gather all the necessary information, ensure the availability of key role players and prepare for the session thoroughly. There should therefore be time allocated to the preparation for the planning itself, the follow up after planning and the monitoring of the implementation of the plan.

What needs to be done to ensure that all stakeholders are involved?

Timely invitation

Clarity of the agenda for the day

Clarity of the process to be followed

Allocation of roles and responsibilities between the Chairperson of the SGB/principal

Open mindedness and an inclusive approach

How long will the planning take?

Strategic planning is ongoing as changes may occur in the environment once a plan has been put together and that may necessitate the re-visiting of the plan. The implementation of the plan needs to be monitored.

What information is needed to plan successfully?

Current situation, e.g. enrolments, financial situation, Departmental policies, regulations and other directives, relevant legislation and information relating to the immediate environment

Who will gather the necessary information?

The principal or educator





EXERCISE

After getting a sense of the process, identify at least three strategic objectives that are relevant.

The role of the facilitator in this exercise will be to ensure that the participants' input indicates an understanding of the meanings of concepts used in strategic planning. Invite participants to share their understanding of these concepts and deal with misconceptions by giving the definitions given below.

TERM	MEANING
Goal	Broad statement of intent and the goal is often broader than the individual project e.g. improve literacy rates/ improve economic health status of learners.
Objectives	What you are trying to achieve stated in concrete measurable terms with time frames.
For example	We want to achieve a 10% improvement in our matric results by 2004.
Action	What I must do to achieve the set objectives. Action differs from activities in the sense that actions are broad and may include a series of activities, e.g. Improve staff morale is a broad action that is made up of several actions.
Activities	These are specific, separate actions that constitute the actions identified above, e.g. to improve staff morale you may need to do the following: <ul style="list-style-type: none">• Ensure timely delivery of learning materials• Start a teacher of the month award• Recognise through public announcement those teachers who have done well• Take a firm stand against those teachers who do not pull their weight• Start supervised study sessions• Start weekend and holiday classes• Reward learners who do well• Introduce a Matric Learner of the Quarter award• Make sure that the renovations are completed by the beginning of Winter 2002
Resources	The things you have or need to use in order to achieve your objectives. I need the support of staff for the supervised study sessions Minimal budget for trophies for the Learner of the Month for each of the 5 subjects included in the project Minimal budget to purchase awards for Teacher of the Month
Outcome	A result you are trying to achieve. Achieving the result that you want. For example: Achieving a 10% increase in Matric pass rates



UNIT 3:

OPERATIONAL PLANNING (p. 15)

DEALING WITH INTENDED UNIT OUTCOMES

- At the beginning of each unit highlight the unit outcomes and record them on the flip chart.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.
- Add what has been left out.
- Tease out what is questionable and eliminate it from the list.

FACILITATOR'S INPUT

Explain to the participants the link that should exist between the processes of Strategic Planning at national and provincial levels, with the process of Operational Planning as the latter process allows for the strategy to be implemented. The National Department determines strategic imperatives, being guided by not only the national agenda but also the regional and international trends.

Provinces should then formulate their strategic and operational plans, feeding into the national strategy as pronounced by DoE.

The Provincial Strategic Plan should be interpreted by the regions and districts which formulate their operational plans.

The schools should formulate their individual operational plans, which should feed into the district operational plans.

EXERCISE (p. 15)

The purpose is to take the participants through a simple planning exercise.

EXAMPLE OF PRACTICAL STRATEGIC PLANNING EXERCISE

GOAL	STRATEGIC OBJECTIVE	ACTIONS	RESPONSIBLE	RESOURCES NEEDED	TIME FRAMES	OUTCOME	PERFORMANCE MEASURE
Protection of learners against abuse	Reduction of sexual abuse of learners	1. Engage in an information campaign. 2. Put in place a sexual harassment policy. 3. Inform learners about procedures	SGB	Time/ money for launch and pamphlets	May 2002	Learners informed of their rights	Improved reporting of sexual abuse cases. Overall drop in the incidence of sexual harassment of learners.





EXAMPLE OF AN OPERATIONAL PLAN

Imagine you are a 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:	ON TIME SUBMISSIONS WITH 100% ACCURACY RATE
Actions	Weekly visits to the district office Open incoming mail within 24 hours of receipt Delegate to subordinates immediately Check on progress on a weekly basis Mark due dates on diary Dispatch to district office at least 3 days ahead of the due date Review in SMT meetings
Required resources	Time Dedicate time in my diary to take care of paper work
Target date	Start Sept 2003- ongoing Monitor progress monthly

FACILITATOR'S INPUT (p. 16).

Give the following explanation to the participants

What is the purpose of operational planning?

- An operational plan gives direction. The plan forces a clearer definition of what the school is trying 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.

Concluding remark on strategic planning

From the exercises, we engaged in, three things are clear:

- Planning is crucial for both personal and career-related matters.
- Within everyone's sphere of influence, there is a need for defining one's strategy and to come up with concrete plans to implement the defined strategy.
- Any plan remains a document unless its implementation is closely monitored.



TYPES OF PLANS (p. 17)

Facilitator's inputs: Defining and facilitating discussion around each type of plan.

List the issues that came out of the discussion. Relate these to the types of plans. Give an example of each type.

	TYPE OF PLAN	ISSUE	EXAMPLE
1	Specific plans	Administration	Handling learner admissions for 2004
2	Directional plans	Employment Equity plan	Set EE targets for the district
3	Long-term plans	Improve Matric results	Introduction of a supervised study period
4	Short-term plans	Sports	Prepare for the tournament

- Improve matric pass rate
- Improve safety in school X
- Eliminate sexual abuse of learners

SECTION B: LEADERSHIP (p. 17)

INTRODUCTION

There is still a great deal of debate about whether leaders are born or made. We also know that people can change as long as they are aware of their weaknesses and are prepared to invest time and money (training) to address their weaknesses. This section deals with issues of leadership. The expectation is that if women managers in education are aware of what good leaders do and how they behave, they will use this to mirror their own behaviours and take positive steps to develop their leadership skills.

Start this section by asking participants to share what they consider to be the link between strategic planning and leadership:

POSSIBLE RESPONSES

Leadership presupposes guiding in some direction. The direction that guidance is provided towards should be a mutually understood direction. In order to cooperatively determine the direction, strategic planning needs to be embarked upon. The implementation of any strategic plan requires effort, dedication, troubleshooting, etc. In order to be able to implement the strategic and operational plans, leadership is needed.

BECAUSE THESE CONSTITUTE THE PHILOSOPHY ON WHICH THE CONTENT IS BASED. KEEP IN MIND THAT IN DEALING WITH ANY SUBJECT THERE ARE VARIOUS PHILOSOPHICAL ORIENTATIONS THAT CAN BE ADOPTED. THIS IS WHAT ALLOWS THE MODULE TO MAKE SENSE.



UNIT 4:

LEADING OTHERS IN TODAY'S EDUCATION ENVIRONMENT (p. 18)

UNIT OUTCOMES (p.18)

FACILITATION PROCESS

- Facilitate discussion on the question of what leadership is before you refer to the notes in the training manual.

Ask participants to:

- Name a few women who are in leadership positions
- Select from the list provided those they would like to model themselves on
- State why they have selected these particular women as their models

FACILITATOR'S NOTES

Share the following definition with the participants to reinforce their understanding. Please note that you can add any other definition of leadership that you know of.

"Leadership is deliberately causing people-driven actions in a planned fashion for the purpose of accomplishing the leader's agenda." (P B Crosby: 1999)

Deliberately: Purposeful direction toward a particular goal.

People-driven: Leadership is centred on people selected to achieve specific goals.

Planned fashion: Laying out a sequence of actions to ensure that people know what is to happen and what is expected of them.

Leader's agenda: What the leader wants and intends to achieve, which provides direction to the others.

FACILITATOR'S INPUT

In order to motivate the participants to assume leadership positions, bring the participant's attention to the Covey's habits of effective people:

- Be proactive
- Begin with the end in mind
- Put first things first
- Think win-win
- Seek first to understand - then to be understood
- Synergise
- Sharpen the saw



Bear in mind that there are several motivating and inspirational points of departure for equipping leaders. Make room for the participants to contribute theirs, if they have any.

Facilitator's input p.19 – Bring to the participants' attention the fact that leadership is not confined to formal situations in the workplace. Oftentimes women play a lot more leadership roles than they recognise. These includes:

- Community leadership roles
- Church related leadership roles
- Clubs and societies, etc.

THIS SHOULD BE AN INDIVIDUAL EXERCISE (p. 18)

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 recent years , and indicate skills that you needed to effectively lead.

FACILITATOR'S INPUT (p. 20)

Emphasise that the question of leadership also involves a highly developed sense of judgement and involves the ability to judge every situation and act accordingly. Hence, good leaders are unpredictable because what they do and say depends on the prevailing circumstances. They think on their feet and are able to take appropriate actions at the right time.

This should be an individual exercise that allows participants to think about their own situation.

Examine the interaction between the leader, followers and situation in relation to your office or school:

- Do you believe that 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?



LEADER, SITUATION AND FOLLOWER INTERACTION (p. 20)

In summarising the lesson, add the following:

Leader: Must accept accountability that goes with leadership.

Follower: Leaders search for followers who are interested in the leader's goal.

Situation: The leader creates environments in which people/followers want to give maximum effort.

Let the participants discuss the above issues of the situation, taking into consideration the following contrasts:

- Do situations within which leadership occurs just happen to be, or are these situations created by other people (other than the leader, such as followers)?
- Ask probing and provocative open-ended questions from the participants' responses in order to encourage creative and innovative thinking.
- As the questions are led by the participants' inputs, these cannot be anticipated and prepared beforehand. The facilitator needs to think about these questions on his/her feet.

EXERCISE (p. 22)

FACILITATION PROCESS

- Take the participants through the diagram on p 22 of the Training Manual.
- Prompt the participants to provide answers as to why there is a point of intersection in the diagram
- Record contributions on a flip chart

MULTIPLICITY OF ROLES PLAYED BY WOMEN MANAGERS (p. 21)

Leadership roles

The leader must have personal characteristics that fit the leadership role. The following four "Cs" best describe the roles that make for good leadership:

Choose:

- The best people for the job.
- Resources to be used for the job.
- Where the job has to be done.
- When the job will be done.

Create:

- Strategies for performing the job.
- Training and development of people who do the job.
- Systems to be used.
- Communication channels.
- Equitable way of distributing resources.

Convince:

- Followers about what they need to know in order to believe in the leader.
- By using the right words at the right time.

Causes:

- Things do happen (leaders are doers).
- Self and other to exert more effort.
- Resources to be mobilised.



LEADERSHIP STYLES (p. 23)

In addition to the leadership types indicated in the training manual, deliberate also on the following personal attributes that affect leadership styles.

TABLE 1: PERSONAL ATTRIBUTES

STYLE	DESCRIPTION OF THE STYLE
The Destructor	<ul style="list-style-type: none">• Leaders who see things from their own point of view and have no regard for others.• They often do not care whether they ruin schedules or disturb lives or the careers of others.
The Procrastinator	<ul style="list-style-type: none">• They waste other people's time and energy.• They avoid coming to a conclusion in any work.• They avoid making decisions or ending a project.
The Caretaker	<ul style="list-style-type: none">• They want things to stay the way they are.• They avoid change and want to establish a feeling of security and solidity.• They fear the unknown.• They fear their own ability to keep up or adapt.• They protect their own turf.
The Prepared	<ul style="list-style-type: none">• They are planners.• They often are not flexible in the face of rapid change.
The accomplisher	<ul style="list-style-type: none">• They have successful relationships.• They complete transactions.• Their strategies are well thought out and communicated.• Their business and personal interactions are successful.

INTEGRATED LEADERSHIP STYLE (p. 23)

This is more common than we often think because leaders are also subject to the expectations of the organisations they lead. This creates a situation where they have to adapt to meet these expectations. As such, there is an element of their own personal inclination as well as demands of the position they hold. The net effect of this is that a leader who ideally will be transformational finds herself forced to be transactional as she/he tries to meet the demands of the job at hand. For instance, women leaders would like to be democratic but this style works best with subordinates that are self motivated and committed. So, if the followers' behaviour falls short, the woman leader should have no qualms in changing gears to get the job done. For instance, when policies are formulated, the transformational leadership style is the best in terms of consultation and inviting input. However, for the implementation of policies, the transactional leadership style based on rewards and punishment is the only way to go if an policy implementation is to be fair and consistent.



LEADERSHIP ISSUES RELATING TO WOMEN (p. 24)

FACILITATION PROCESS

EXERCISE (p. 24)

- Summarise the words that typically describe women leadership styles.
- In small groups, let the participants discuss Mrs X's situation.

The problem might be with Mrs X's attitude toward work. Despite her brilliance Mrs X might not be a performer, is tardy and therefore cannot meet deadlines. Mrs X might not be able to manage her time in order to perform effectively. As a result, the panel's decision has nothing to do with the glass ceiling. The barrier as identified may be of Mrs X's making.

LEADING THROUGH EMPOWERMENT (p. 25)

LEADERSHIP STYLES:

EXERCISE (p. 25)

Look at the general characteristics of the leadership styles of men and women. Which of these best describe your leadership style? Using the table below, match each word with the leadership style of men or of women. These are merely examples and participants should do this exercise individually to allow themselves space to be honest without risking being judged.

WORD THAT BEST DESCRIBES YOUR LEADERSHIP STYLE	IS THIS STYLE TYPICALLY THAT OF MEN OR WOMEN?
Competitive	Men
Caring	Women
Disciplined	Men
Tolerant	Women
Evaluative	Men
Aggressive	Men
Task oriented	Men
People oriented	Women



CHALLENGES (p. 28)

FACILITATION PROCESS

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.

FACILITATION PROCESS

- Before discussing the challenges as listed in the training manual, ask the participants to list what currently challenges their leadership role.
- Ask the participants to use the following grid to state what possible solutions there are for their challenges.
- They have to indicate what their particular role will be in meeting the listed challenges.

EXAMPLES

CHALLENGE	HOW IT CAN BE DEALT WITH THE SKILL
Information age	Become computer literate Enhance access to computers by both learners and educators Seek donations of old computers from companies Keep abreast of developments via internet
Diversity	Learn to respect other cultures See others as different not inferior Learn as much about other cultures as possible Keep an open mind Men and women are different - no one is inferior

The challenges in the training manual must only be referred to when summarising the lesson.

Before concluding this unit invite participants to do the following:

Using the list of skills provided, they should list those which they still need to acquire within the:

- Next year
- Two years
- Three years

Summarise by emphasising the skills crucial to effective leadership.



Using the grid below, each aspiring woman leader must state how she will acquire those skills crucial to effective leadership. (p. 27).

These are merely examples that you can share with the participants as an ice-breaker.

REQUIRED LEADERSHIP	TIMEFRAME	HOW TO ACQUIRE THE SKILL
Effectively manage meetings for maximum participation and productivity	In a year	Read about how to conduct effective meetings. Observe and emulate people who conduct effective meetings Do introspection and determine what aspects of your personal style compromises your ability to conduct effective meetings. Be honest. Develop strategies to overcome your weaknesses
Manage conflict		Make a conscious decision not to avoid conflict Read about conflict management Develop a set of steps that you will follow in dealing with conflict When conflict arises, deal with it immediately
Conduct and facilitate a	In two years	Read about strategic planning processes Acquire facilitation skills Observe skilled facilitators in action Conduct with a group of trusted colleagues/ friends a mock strategic planning sessions



UNIT 5:

POWER AND INFLUENCE *(p. 27)*

FACILITATION PROCESS

UNIT OUTCOMES *(p. 27)*

- At the beginning of each unit highlight the unit outcomes.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

DEFINING POWER AND INFLUENCE *(p. 27)*

- Ask the participants to define power in their own words.
- Ask them to do the same with influence.
- Urge them to describe the power or influence they have.

EXAMPLE

- I have power to allocate resources according to priorities.
- I have influence over the way educators at my school schedule their lessons.
- Educators schedule their lessons according to the needs of the school.

FACILITATION PROCESS

- Steer the discussion into contrasting the two concepts in order for the participants to gain more insight.
- Conclude the discussion by emphasising that in power there is influence.
- Power is defined as the capacity one person has to influence the behaviour of another.
- Capture the key points of the participants' contributions on the flip chart.

TACTICS OF POWER AND INFLUENCE *(p. 28)*

Explain the materials on page 28 of the Training Manual, highlighting the more acceptable power tactics. For example, expert power which tends to attract more followers for the benefit of the task or the organisation. Indicate that the way the different basis of power are ordered, is from the least acceptable to the most acceptable in organisational terms.

Use the information in the manual for a discussion on page 28.

- The differences between power and leadership
- Bases of power

Encourage participants to provide examples.

Capture the key points on the flip chart



EXERCISES (p. 29)

ANSWERS:

SENTENCE	POWER BASE
<ul style="list-style-type: none">I want to avoid getting Sam angry because he might harass me at work.	Coercive power
<ul style="list-style-type: none">I defer to Maggie's judgement in engineering matters because she has the experience and knowledge to earn my respect.	Expert Power
<ul style="list-style-type: none">It will be an advantage to trade favours with Colleen, because she will be in a position to give me special benefits and rewards.	Reward Power
<ul style="list-style-type: none">Sila has the right to expect me to comply with her legitimate requests if we have to consider her position and job responsibilities.	Legitimate Power
<ul style="list-style-type: none">I like Thabang and I enjoy doing things with him.	Referent Power

POWER TOOLS (p. 29)

EXERCISE (p. 30)

FACILITATION PROCESS

- Ask the participants to describe the circumstances under which they would apply the power tools as described in the training manual.
- Participants must also indicate why they would apply those tools under the stated circumstances.
- Combine this with the discussion on "which power tools appeal to you and why?"
- Ask open-ended questions to draw more participants into the discussion.
- Particularly draw in those participants who seem to have been contributing less in previous discussions. Do this in a non-directive and non-threatening manner.
- Capture the main points of the discussion on the flip chart.



UNIT 6:

LEADING THROUGH ORGANISATIONAL CHANGE (p. 30)

UNIT OUTCOMES:

- At the beginning of each unit highlight the unit outcomes.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record this on the flip chart.

DEFINING CHANGE (p. 30)

- Facilitate a discussion on the question of what change is.
- Capture those words that best describe change on the flip chart.
- Where possible, urge participants to air their views on the concept.
- Draw the discussion to a point where participants would indicate in what way women and men handle change differently.
- Give participants a sheet of paper with the following grid so that they can capture their contribution.

EXERCISE (p. 33)

HOW WOMEN HANDLE CHANGE	HOW MEN HANDLE CHANGE
Are often careful to take others with	More often caught up in change/fighting it that they forget to take others with
Sometimes change becomes a source of anxiety	Even if change causes men anxiety they go to great lengths to hide it
Careful to explain what has changed to others	Often do not give sufficient communication about change
Seek advice about how the new situation is to be handled	Often do not consult

Let the participants share their views and capture the key points on the flip chart. Emphasise that it is not a case that all men are the same or all women are the same. This is how many women and men behave if faced with change. But to this general rule, there are always exceptions. It also depends on the significance of the issue that is the subject of change to the individual affected.



FACTORS THAT INFLUENCE CHANGE (p. 31)

FACILITATION PROCESS

Ask the participants to:

- List the factors that influence change in their work situation.
- List the factors that influence change in education generally.

Capture the lists on two separate flip sheets.

Take the participants through the contrasts or similarities of the factors listed.

Use the information in the training manual to summarise.

STAGES OF ADJUSTING TO CHANGE (p. 34)

FACILITATION PROCESS

- Go through the different stages of adjusting to change with the participants.
- Highlight the strategies that can be used at each stage as provided in the training manual.
- Allow the participants to slowly think and reflect on this.
- Put enquiring questions to the participants in order to encourage deeper reflection on the issues discussed.
- Invite participants to share their own experiences related to the adjustment to change.
- Sift some lessons from the shared experiences and capture them on the flip chart.

INDIVIDUAL SOURCES OF RESISTANCE TO CHANGE (p. 36)

- Let the participants list the sources of resistance based on individual attributes.
- Add to the participants' lists the sources provided in the training manual.
- Alternatively, depending on how long the participants' list is, group their contributions under the sources provided in the training manual.
- Ask the participants to give suggestions of how to deal with each source.
- The following grid may be used:

INDIVIDUAL SOURCE OF RESISTANCE	SUGGESTED SOLUTION
Habits	
Security	
Economic factors	
Fear of the unknown	
Information processing	

- Let the small groups discuss the questions.
- The groups must capture the key points of their discussions on the flip chart.
- Summarise and comment on the points captured.



ORGANISATIONAL SOURCES OF RESISTANCE TO CHANGE (p. 37)

FACILITATION PROCESS

- Let the participants ponder over the following:

"To what extent is your work situation (be it in a school, head, provincial or district office) resistant to change?" and what are the most common sources of resistance to change?

- 1 = rarely
- 2 = common
- 3 = very common

What do you consider to be the effect of this resistance to change on productivity?	1	2	3
Organisational source of change			
Threat to established power relation			
Structural inertia			
Group inertia			
Limited focus for change			
Threat to expertise			
Threat to established resource allocation			

What are the effects of this resistance to change on learners, educators and the school as a whole?

FACILITATOR'S NOTES

CONCLUDING THOUGHTS (p. 38)

- Go through the concluding thoughts slowly but emphatically.
- Let the participants ponder over each thought.
- After a significant pause, ask the participants to write their commitments on the flip chart.
- Indicate that these commitments will be used to track their progress in six months' time.



17. 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.

18. 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.



T

able of contents

1. Background to the module	1
2. Pre-workshop diagnosis	1
3. Practical considerations	1
4. Practical activities	2
5. Before you begin	2
6. Dealing with unit outcomes	2
7. Suggested time frames	3
8. Practical exercises	3
9. Allocation of time	3
10. Follow-up activities	3
11. Preface to the module	3
12. Broad aims of the module	4
13. Dealing with participants' expectations	4
14. The structure of the facilitator's notes	4
15. Materials for reference purposes	5
16. Starting the workshop	5
Unit 1: Definitions of Diversity	6
Unit 2: Defining of Diversity Management	9
Unit 3: Managing Diversity	11
17. Workshop evaluation	12
18. Conclusion	12
Annexure	13



FACILITATOR'S GUIDE: DIVERSITY MANAGEMENT

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 Diversity Management
- 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.

A manageable group of 15 will allow space for interaction within the group.

If possible, it is important to ensure that a diverse group of participants is put together. The group can be desegregated into race, geographic location (urban versus rural), age, educational and occupational levels.

A good mixture of diverse issues to deal with in the workshop will help participants grasp the realities brought about by different situations.

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.
- You need to be caring and commit to improving and transforming the participants' views.
- You need to ensure that participants trust their own ability to learn. Make their knowledge and experience important for the learning process.
- It is important to study the contents of the training manual. before the date of the workshop.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit, highlight the unit outcomes.

On the 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.



7. SUGGESTED TIME FRAMES

The module has three distinct sections, namely:

- Defining diversity and diversity management.
- Approaches to and tactics for diversity management.
- Developing a diversity plan.

Depending on the identified themes developed from the participants' needs, each of the above sections will take at least half a day. Taking into consideration the length of some practical exercises, a two-day workshop is suggested in order to allow for sufficient interaction between participants.

8. PRACTICAL EXERCISES

Encourage participants to contribute actively and critically.

Balance the participants' involvement and contributions with the facilitator's input as indicated in the training manual.

9. ALLOCATION OF TIME

In this module the time allocation will depend on the themes and sections to be covered. Emphasise particular sections according to the identified needs.

10. FOLLOW-UP ACTIVITIES

Follow-up will be done at six-monthly intervals.

The purpose is to determine the impact that the training has had on the participants' day-to-day activities and challenges.

Tracking will be done through questionnaires.

11. PREFACE TO THE MODULE

The preface of this module will give you a sense of the philosophy from which the module departs.

It is important, therefore, to recognise that various philosophical orientations can be adopted within the workshop process. Study the preface and allow for participants' philosophical inputs whilst managing the process.

As a facilitator, take into account the "School Management Teams: Managing Diversity" module developed by the Department of Education.

Acknowledge the diverse environment within which women managers operate.

Recognise the need for women managers and leaders to be equipped with appropriate skills for dealing with issues of diversity within an enabling legal framework.



12. BROAD AIMS OF THE MODULE

The materials are designed around OBE principles. Owing to the specificity of the outcomes, the OBE principles are covered at the level of each section.

Ask participants what they expect to get out of the workshop.

Also find out from the participants if there are any additional outcomes that they would like to get out of the workshop.

Put these up on the flip chart. This will be handy for determining whether the overall workshop objectives were attained.

13. DEALING WITH PARTICIPANT EXPECTATIONS THAT ARE NOT IN LINE WITH WHAT THE WORKSHOP IS MEANT TO COVER

- Receive participants' input without censoring it so as 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 listed expected outcomes for re-visiting as part of the conclusion which will include checking whether participants feel that the outcomes were attained

14. THE STRUCTURE OF THE FACILITATOR'S NOTES

Note that the nature of this module is activity-based and deals with "hot" and sensitive issues that might incite negative feelings. Manage the process objectively whilst reflecting emerging feelings so that they can be dealt with.

Share the ownership of the process with the group while empowering rather than controlling the participants.

Although most of the information to be imparted is in the manual, familiarise yourself with Annexure 1 in order to highlight issues of persons with disabilities in the module. Take note that the diversity mixtures include issues of disability.

The facilitator's manual only adds to the information given in the training manual that deserves further elaboration.

Note that only the relevant sections of the training manual are highlighted in the facilitator's guide.

This module calls for your creativity and innovation.

Give attention to those areas in your training manual where facilitator's input is indicated.





15. MATERIALS FOR REFERENCE PURPOSES

Facilitator to bring for reference purposes excerpts from the following piece of legislation:

Employment Equity Act 55 of 1998.

16. STARTING THE WORKSHOP

It is important to commence the workshop with the following activity –

- Ask the participants to introduce themselves by stating:
 - Who they are?
 - How long they have worked for education?
 - Who they work with?

Let the participants desegregate their work colleagues in terms of gender and race without mentioning names, e.g. in my directorate we are five black women, one Indian woman, two white women and six white men.

The purpose is to enable participants to identify the diversity mixtures within their situations.

To enhance learning, draw the following grid in order to capture the participants' responses.

FEMALES				MALES			
BLACKS	ASIANS	COLOURED	WHITES	BLACKS	ASIANS	COLOURED	WHITES

This should bring you to the definition of diversity and diversity management as presented in the training manual.



UNIT 1:

DEFINITIONS OF DIVERSITY (p. 1)

FACILITATION PROCESS

Explain to participants how their responses to the ice-breaker on who they are, how long they've worked for education and who they work with has contributed to the definition of diversity.

COMBINATION OF DIFFERENCES AND SIMILARITIES (pp. 2-3)

As the participants contribute to the mixtures, ask them under which category in the following grid they should be placed:

WORKFORCE DIVERSITY	BEHAVIOURAL DIVERSITY
STRUCTURAL DIVERSITY	BUSINESS DIVERSITY

PERSONALITY DIMENSION	INTERNAL DIMENSION
ORGANISATIONAL DIMENSION	EXTERNAL DIMENSION





The rating will direct the facilitation towards increasing the participants' understanding of diversity issues.

If the answer should be "not at all", then the following remedies are suggested:

RESPONSES FROM PARTICIPANTS	STEP TO BE TAKEN
I have clarity on what the concept of diversity means	If at this stage most (more than a third) of the participants are not clear about what diversity means, then repeat the lesson from page 1.
I can identify diversity mixtures in my office/school	The same applies here. If the participants cannot identify diversity mixtures, a repeat of the lesson is required.
I have observed the following Diversity mixtures in my school/office: Workforce/school diversity Behavioural diversity Structural diversity Business diversity	Capture what the participants have observed in their situation and let them categorise according to the given headings.
I have observed the following diversity dimensions in my school/office: Organisational/school Internal dimension External dimension Personality dimension	Capture what the participants have observed in their situation and let them categorise according to the given headings.

A DISCUSSION ON DIVERSITY STORIES (pp. 5-6)

FACILITATION PROCESS

- Divide the participants into small groups.
- Let the participants analyse the stories in terms of:
 - Bases for a diversity mixture.
 - Diversity tension.
 - Approaches.



ANSWER:

DIVERSITY STORY	BASE FOR DIVERSITY MIXTURE	DIVERSITY TENSION	SUGGESTED APPROACH
Matlala family	Racial differences Language differences Learning styles Aspirations. Communication styles Attitudes and expectation	Violation of heritage and language pride Wrong teaching Perception that standards are unfairly imposed on others	Valuing diversity
Mrs. Boshoff	Gender Practiced beliefs and values Attitudes and expectations Thinking styles	Perceptions that Mrs Boshoff will not cope in a conservative environment because she is a woman. She feels compromised for what the department refuses to deal with.	Affirmative action measures
Mr. Chuku	Xenophobia Ethnicity Attitudes and expectations Communication Practiced beliefs and values	Mr Chuku is disappointed because he does not seem to fit into the much sought-after rural environment. Learners Do not understand Mr Chuku's approach. Frustrations occurred, as both parties did not seem to communicate well.	Valuing diversity Managing diversity
Maria	Gender Attitudes and expectations Aspirations Patriarchy Thinking style Work styles Communication	Gender discrimination Societal attitudes that permeate the education environment.	Valuing diversity Managing diversity





UNIT 2:

DEFINING DIVERSITY MANAGEMENT (p. 7)

FACILITATOR'S INPUTS

Within the education context, diversity would mean differences based on such dimensions as race, gender, age, functional and educational background, lifestyles, geographic origins and even sexual preferences. Diversity is not confined to race and gender only. It forms part of a larger complex picture related to cultural, environmental, social, political and economic issues.

Diversity within organisations presents great challenges requiring complex intervention strategies for its management.

Diversity management, like affirmative action, is a means to achieve employment equity. Managing diversity "seeks to achieve equity through the creation of inclusive diversity which will help the organisation attain a competitive advantage". Diversity management emphasises exclusivity to embrace the recognition, participation and involvement of all parties standing to benefit from its processes.

It also stresses synergy and unison in facilitating the achievement of educational goals. In this context it is often referred to as a process of making an organisation more inclusive.

It seeks to create an education environment that would ensure the well-being of everyone. It is a comprehensive managerial process for developing an environment that works for all educators, non-educators and learners.

BASED ON THE ABOVE, DIVERSITY MANAGEMENT IN EDUCATION SHOULD BE:

Strategically driven: Behaviour patterns and policies are seen as contributing to educational goals and objectives. Performance and productivity are tied to rewards and results.

Behavioural: Emphasis is on building specific skills and develops policies that get the best from everyone. Efforts are monitored by progress toward the achievement of goals and objectives.

Pragmatic: Education will benefit in terms of performance, increased morale and productivity.

Synergy model: Model that assumes that those diverse groups will create new ways to work together effectively.



DIVERSITY MANAGEMENT TACTICS (p. 10)

FACILITATION PROCESS

Using the following grid let the participants identify tactics used with their own situation-

- Encourage the participants to to:
 - Describe the tactics
 - Suggest an approach to deal with the tactic

TACTIC	DESCRIPTION OF TACTIC	APPROACH TO TACTIC

EXERCISE (p. 10)

Invite the participants to discuss the questions in the exercise.

ANSWER:

DIVERSITY TENSION	IDENTIFIED TACTIC	SUGGESTED APPROACH	ANTICIPATED OUTCOME
Racial-based	Denial Suppression Exclusion Assimilation	Valuing diversity	Withdrawal of the learner from school. Despondency Flight

FACILITATION PROCESS

- Explore more possibilities with the participants.
- Assist the groups to report back to the plenary session.

CHALLENGES FOR WOMEN LEADERS (p. 11)

FACILITATION PROCESS

- Ask the participants to state what diversity challenges face them in the workplace.
- List these on the flip chart.
- Summarise by reading the challenges provided in the training manual.



UNIT 3:

MANAGING DIVERSITY: DEVELOPING A MODEL DIVERSITY PLAN FOR THE DEPARTMENT OF EDUCATION (p. 12)

- In small groups, let the participants develop a diversity plan.
- A participant in a group can offer or volunteer her situation as a basis for the required information.
- Or a group can use an imaginary situation and draw on their experiences as information for the plan.
- Let the groups choose how they will get the information for the exercise.

PHASE	WHAT YOU HAVE TO DO	HOW TO APPROACH THIS IN YOUR SITUATION
1	Understand the context in which you are operating.	
2	Using the earlier definitions, identify and define the diversity mixtures with-in your office or school.	
3	Identify diversity tensions that exist in your situation.	
4	Secure top-level commitment.	
5	Establish a Diversity Steering Committee.	
6	Complete an assessment of diversity issues	
7	Develop a diversity plan.	
8	Get Management Team approval.	
9	Implement training and other diversity interventions.	
10	Monitor and evaluate diversity efforts.	

FACILITATION PROCESS

- Let the groups give feedback to a bigger group.
- Contrast the groups' efforts with the model plan provided in the training manual.
- Let the participants commit to the development of plans for their situations.
- Note this for tracking after six months, therefore contract with the groups on this.



17. 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.

18. CONCLUSION: WERE THE WORKSHOP OUTCOMES ATTAINED?

- Re-visit 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.





ANNEXURE:

CODE OF GOOD PRACTICE ON KEY ASPECTS OF DISABILITY IN THE WORKPLACE

GOVERNMENT NOTICE NO. R. 19 APRIL 2001

1. AIMS

- 1.1. The Employment Equity Act, No. 55 of 1998 protects people with disabilities against unfair discrimination and entitles them to affirmative action measures.
- 1.2. The Code is a guide for employers and employees on key aspects of promoting equal opportunities and fair treatment for people with disabilities as required by the Employment Equity Act (the Act).
- 1.3. The Code is intended to help employers and employees understand their rights and obligations, promote certainty and reduce disputes to ensure that people with disabilities can enjoy and exercise their rights at work.

2. STRUCTURE

The Code covers the following aspects:

- i The definition of disability
- ii Reasonable accommodation for people with disabilities
- iii Avoiding unfair discrimination and achieving employment equity during the employment cycle (from recruitment to termination)
- iv Confidentiality and disclosure
- v Employment benefits
- vi Employment equity planning

3. APPLICATION

- 3.1. The Code is not an authoritative summary of the law, nor does it create additional rights and obligations. Failure to observe the Code does not, by itself, render a person liable in any proceedings. Nevertheless when the courts and tribunals interpret and apply the Employment Equity Act, they must consider it.
- 3.2. The Code should be read in conjunction with other Codes of Good Practice that may be issued by the Minister of Labour.
- 3.3. The Code is intentionally general because every person and situation is unique and departures from the standards in this code may be justified in appropriate circumstances.
- 3.4. Employers, employees and their organisations should use the Code to develop, implement and refine disability equity policies and programmes to suit the needs of their own workplaces.

4. LEGAL FRAMEWORK

The Code is issued in terms of Section 54(1)(a) of the Employment Equity Act, No. 55 of 1998 and is based on the Constitutional principle that no one may unfairly discriminate against a person on the grounds of disability.



5. DEFINITION OF PEOPLE WITH DISABILITIES

5.1 Defining persons with disabilities under the Act

The scope of protection for people with disabilities in employment focuses on the effect of a disability on the person in relation to the working environment, and not on the diagnosis of the impairment.

Only people who satisfy all the criteria in the definition:

- (i) long-term or recurring;
 - (ii) having a physical or mental impairment;
 - (iii) which substantially limits,
- are considered as persons with disabilities.

5.1.1 Long-term or recurring

- (i) Long-term means the impairment has lasted or is likely to persist for at least twelve months. A short-term or temporary illness or injury is not an impairment which gives rise to a disability.
- (ii) A recurring impairment is one that is likely to happen again and to be substantially limiting (see below). It includes a constant underlying condition, even if its effects on a person fluctuate.
- (iii) Progressive conditions are those that are likely to develop or change or recur. People living with progressive conditions or illnesses are considered as people with disabilities once the impairment starts to be substantially limiting. Progressive or recurring conditions which have no overt symptoms or which do not substantially limit a person are not disabilities.

5.1.2 Impairment

- (i) An impairment may be physical or mental.
- (ii) 'Physical' impairment means a partial or total loss of a bodily function or part of the body. It includes sensory impairments such as being deaf, hearing impaired, or visually impaired and any combination of physical or mental impairments
- (iii) 'Mental' impairment means a clinically recognised condition or illness that affects a person's thought processes, judgement or emotions.

5.1.3 Substantially limiting

- (i) An impairment is substantially limiting if, in the absence of reasonable accommodation by the employer, a person would be either totally unable to do a job or would be significantly limited in doing the job.
- (ii) Some impairments are so easily controlled, corrected or lessened, that they have no limiting effects. For example, a person who wears spectacles or contact lenses does not have a disability unless, even with spectacles or contact lenses, the person's vision is substantially impaired.
- (iii) An assessment whether the effects of impairment are substantially limiting must consider if medical treatment or other devices would control or correct the impairment so that its adverse effects are prevented or removed.



- (iv) For reasons of public policy certain conditions or impairments may not be considered disabilities. These include but are not limited to: sexual behaviour disorders that are against public policy; self-imposed body adornments such as tattoos and body piercing; compulsive gambling, tendency to steal or light fires; disorders that affect a person's mental or physical state if they are caused by current use of illegal drugs or alcohol, unless the affected person is participating in a recognised programme of treatment; normal deviations in height, weight and strength; and conventional physical and mental characteristics and common personality traits.

6. REASONABLE ACCOMMODATION FOR PEOPLE WITH DISABILITIES

- 6.1. Employers should reasonably accommodate the needs of people with disabilities. The aim of the accommodation is to reduce the impact of the impairment of the person's capacity to fulfil the essential functions of a job.
- 6.2. Employers may adopt the most cost-effective means that are consistent with effectively removing the barrier to a person being able to perform the job and to enjoy equal access to the benefits and opportunities of employment.
- 6.3. Reasonable accommodation applies to applicants and employees with disabilities and may be required:
 - (i) during the recruitment and selection processes;
 - (ii) in the working environment;
 - (iii) in the way work is usually done and evaluated and rewarded; and
 - (iv) in the benefits and privileges of employment.
- 6.4. The obligation to make reasonable accommodation may arise when an applicant or employee voluntarily discloses a disability-related accommodation need or when such a need is reasonably self-evident to the employer.
- 6.5. Employers must also accommodate employees when work or the work environment changes or impairment varies which affects the employee's ability to perform the essential functions of the job.
- 6.6. The employer should consult the employee and, where practicable, technical experts to establish appropriate mechanisms to accommodate the employee.
- 6.7. The particular accommodation will depend on the individual, the impairment and its effect on the person, as well as on the job and the working environment.
- 6.8. Reasonable accommodation may be temporary or permanent, depending on the nature and extent of the disability.
- 6.9. Examples of reasonable accommodation include:
 - (i) adapting existing facilities to make them accessible;
 - (ii) adapting existing equipment or acquiring new equipment including computer hardware and software;
 - (iii) re-organising work stations;
 - (iv) changing training and assessment materials and systems;
 - (v) restructuring jobs so that non-essential functions are re-assigned;
 - (vi) adjusting working time and leave;
 - (vii) providing readers, sign language interpreters; and
 - (viii) providing specialised supervision, training and support.
- 6.10. An employer may evaluate work performance against the same standards as other employees but the nature of the disability may require an employer to adapt the way performance is measured.



- 6.11. The employer need not accommodate a qualified applicant or an employee with a disability if this would impose an unjustifiable hardship on the business of the employer.
- 6.12. Unjustifiable hardship is action that requires significant or considerable difficulty or expense and that would substantially harm the viability of the enterprise. This involves considering the effectiveness of the accommodation and the extent to which it would seriously disrupt the operation of the business.
- 6.13. An accommodation that imposes an unjustifiable hardship for one employer at a specific time may not be so for another or for the same employer at a different time.

7. RECRUITMENT AND SELECTION

7.1 Recruitment

- 7.1.1 When employers recruit they should:
- (i) identify the inherent requirements and essential functions of the vacant position;
 - (ii) describe clearly the necessary skills and capabilities for the job;
 - (iii) set reasonable criteria for selection, preferably in writing, for job applicants for vacant positions.
- 7.1.2. The inherent requirements of the job are the purposes for which the job exists. The essential functions and duties of the job are what are necessary to get the job done.
- 7.1.3. Application forms should focus on identifying an applicant's ability to perform the essential functions of the job.
- 7.1.4. Advertisements should be accessible to persons with disabilities and, where practicable, circulated to organisations that represent the interests of people with disabilities.
- 7.1.5. Advertisements or notices should include sufficient detail about the essential functions and duties of the job so that potential applicants with disabilities can make an informed decision if they meet the inherent requirements of the job.
- 7.1.6. Employers should not include functions that are not essential to performing the inherent requirements of the job because selection based on non-essential functions may exclude people with disabilities unfairly.
- 7.1.7. On request, and if reasonably practicable, notices and advertisements should be provided in a format appropriate to persons with disabilities, such as large print, Braille, or audiotape.

7.2 Selection

- 7.2.1. Employers should apply the same criteria to test the ability of people with disabilities as are applied to other applicants, although it may be necessary to accommodate applicants who have disabilities.
- 7.2.2. The purpose of the selection process is to assess whether or not an applicant is suitably qualified. This may require a two-stage process if an applicant has a disability:
- (i) Determining whether an applicant is suitably qualified;
 - (ii) Determining whether a 'suitably qualified applicant' needs any accommodation to be able to perform the inherent requirements or essential functions of the job.



- 7.2.3. When assessing if an applicant is suitably qualified, an employer may not request information about actual or perceived disability from a previous employer or third party.
- 7.2.4. Employers should monitor their criteria for selection. If they tend to exclude people with disabilities, they should be reviewed to ensure that inappropriate barriers to persons with disabilities are removed.

7.3 Interviews

- 7.3.1. Selection interviews should be sensitive, objective and unbiased. Interviewers should avoid assumptions about people with disabilities.
- 7.3.2. If an applicant has disclosed a disability or has a self-evident disability, the employer must focus on the applicant's qualifications for the work rather than any actual or presumed disability but may enquire and assess if the applicant would, but for the disability, be suitably qualified.
- 7.3.3. Interviewers should ask all applicants to indicate how they would accomplish the inherent requirements of the job and perform its essential functions and whether accommodation is required.
- 7.3.4. If the employer knows in advance that an applicant has a disability, the employer should be prepared to make reasonable accommodation during the interview.

7.4 Conditional job offers

- 7.4.1. If an applicant with a disability is suitably qualified, an employer may make a job offer conditional on medical or functional testing to determine an applicant's actual or potential ability to perform the essential functions of a specific job.
- 7.4.2. The testing must comply with the statutory requirements and be consistent with measuring if the applicant is able to perform the essential functions of the job, with or without reasonable accommodation.
- 7.4.3. An employer may test applicants with disabilities for a specific job and not require all other applicants to undergo testing.
- 7.4.4. If the testing shows that accommodation requirements would create unjustifiable hardship, or that there is an objective justification that relates to the inherent requirements of the job or to health and safety, the employer may withdraw the job offer.

7.5 Terms and conditions of employment

- 7.5.1. An employer may not employ people with disabilities on less favourable terms and conditions for reasons connected with the disability.

8. MEDICAL AND PSYCHOMETRIC TESTING

8.1. Medical testing

- 8.1.1. Tests must be relevant and appropriate to the kind of work and the necessary fitness criteria for the job, the workplace and its hazards, and necessary to the employer's business.
- 8.1.2. Employers should establish that tests do not unfairly exclude and are not biased in how or when they are applied, assessed or interpreted.



- 8.1.3. Tests to establish the health of an applicant or employee should be distinguished from tests that assess the ability to perform essential job functions or duties.
- 8.1.4. Health testing should therefore only be carried out after an employer has established that the person is in fact competent to perform the essential job functions or duties and after a job offer has been made. The same applies to medical testing for admission to membership of an employee benefit scheme.
- 8.1.5. An employer who requires a person to undergo any medical, health screening or safety test must bear the costs of the test.

8.2. Testing after illness or injury

- 8.2.1. If an employee has been ill or injured and it appears that the employee is not able to perform the job, the employer may require the employee to agree to a functional determination of disability.
- 8.2.2. Such medical or other appropriate tests shall be to assess if the employee can safely perform the job or to identify reasonable accommodation for the employee.

8.3. Health screening and safety

- 8.3.1. Employers are obliged to provide and maintain a working environment that is safe and without risk to the health of employees.
- 8.3.2. An employer should not employ a person if the employer can demonstrate that a person with a disability would represent an actual direct risk of substantial harm to his or her own or other people's safety, which could not be eliminated or reduced by applicable reasonable accommodation.
- 8.3.3. An employer may or need not retain an employee, if objective assessment shows that even with reasonable accommodation, the work would expose the employee and others to substantial health risk and that there is no reasonable accommodation to mitigate that risk.

8.4. Pre-benefit medical examinations

- 8.4.1. Employees may be required to submit to medical examination or tests before becoming members of employee benefit schemes that are offered within the employment relationship.
- 8.4.2. The purpose of these examinations is to assess a person's suitability for membership of a benefit scheme and is not relevant to a person's capability to perform the inherent requirements of the job.
- 8.4.3. Therefore an employer may not refuse to recruit, train, promote or otherwise prejudice any person only because that person has been refused membership of a benefit scheme.

9. PLACEMENT

- 9.1. Placement involves the orientation and initial training a new employee.
- 9.2. New employees with disabilities must be treated equally, subject to reasonable accommodation, to employees who do not have disabilities.
- 9.3. Orientation and initial training should be accessible, responsive to and able to accommodate the needs of employees who have disabilities.



10. TRAINING AND CAREER ADVANCEMENT

- 10.1. Employees with disabilities should be consulted so as to develop specific career advancement programmes responsive to their needs and circumstances.
- 10.2. Training, work organisation and recreational benefits should be accessible to employees with disabilities. Examples are training tools, materials, venues and processes, as well as canteen facilities, parking, crèche and social and sporting activities.
- 10.3. Systems and practices to evaluate work performance should clearly identify and fairly measure and reward performance of the inherent requirements or essential functions of the job. Work that falls outside the inherent requirements or essential functions of the job should not be evaluated.

11. RETAINING PEOPLE WITH DISABILITIES

- 11.1. Employees who become disabled during employment should, where practicable, be re-integrated into work.
- 11.2. If an employee is, or becomes a person with a disability, the employer should keep in touch with the employee and where practicable, encourage early return to work. This may require vocational rehabilitation, transitional work programmes and where appropriate, temporary or permanent flexible working time.
- 11.3. If an employee is frequently absent from work for reasons of illness or injury, the employer may consult the employee to assess if the cause of the illness or injury is a disability that requires accommodation.
- 11.4. If practicable, employers should offer alternative work, reduced work or flexible work placement, so that employees are not compelled or encouraged to apply for benefits if they could, with reasonable accommodation, continue in employment.

13. TERMINATION OF EMPLOYMENT

- 13.1. If an employee becomes disabled, the employer should consult the employee to assess if the disability can be reasonably accommodated.
- 13.2. If not, the employer should consult the employee to explore the possibility of alternative employment appropriate to the employee's capacity.
- 13.3. If the employee is unable to be accommodated or there is not appropriate alternative employment, the employer may terminate the employment relationship.
- 13.4. When employees who have disabilities are dismissed for operational requirements, the employer should ensure that any selection criteria do not directly or indirectly unfairly discriminate against people with disabilities.
- 13.5. Employers who provide disability benefits should ensure that employees are fairly advised before they apply for the benefits available and before resigning from employment because of a medical condition.

14. CONFIDENTIALITY AND DISCLOSURE OF DISABILITY

14.1. Confidentiality

- 14.1.1. Employers, including health and medical services personnel, may only gather private information relating to employees if it is necessary to achieve a legitimate purpose.



- 14.1.2. Employers must protect the confidentiality of the information that has been disclosed and must take care to keep records of private information relating to the disability of applicants and employees confidential and separate from general personnel records.
- 14.1.3. When an employer no longer requires the information it must be returned to the employee or be destroyed or rendered anonymous.
- 14.1.4. Employers may not disclose any information relating to a person's disability without the written consent of the person concerned.

14.2. Employee disclosure

- 14.2.1. People with disabilities are entitled to keep their disability status confidential. But if the employer is not aware of the disability or the need to be accommodated, the employer is not obliged to provide it.
- 14.2.2. If the disability is not self-evident the employer may require the employee to disclose sufficient information to confirm the disability or the accommodation needs.
- 14.2.3. If the employer disputes that the employee is disabled or that the employee requires accommodation, the employer is entitled to request the employee to be tested to determine the employee's ability or disability, at the expense of the employer.
- 14.2.4. As information about disability may be technical, employers should ensure that a competent person interprets the information.
- 14.2.5. If an employer requires further information this must be relevant to a specific job and its essential functions.
- 14.2.6. If accommodating the employee requires the co-operation of other employees, it may be necessary to reveal the fact of a person's disability if it is not otherwise obvious, to some of the person's colleagues, particularly a supervisor or manager.
- 14.2.7. The employer may, after consulting the person with the disability, advise relevant staff that the employee requires accommodation, without disclosing the nature of the disability, unless this is required for the health or safety of the person with the disability or other persons.

15. EMPLOYEE BENEFITS

- 15.1. An employer who provides or arranges for occupational insurance or other benefit plans directly or through a separate benefit scheme or fund, must ensure that they do not unfairly discriminate, either directly or indirectly against people with disabilities.
- 15.2. Employees with disabilities may not be refused membership of a benefit scheme only because they have a disability.
- 15.3. To increase job security for employees who have disabilities and to reduce the costs of benefit schemes, designated employers should investigate and, if practicable, offer benefit schemes that reasonably accommodate persons with disabilities.

These include:

- (i) vocational rehabilitation, training and temporary income replacement benefits for employees who, because of illness or injury, cannot work for an extended period, and



- (ii) financial compensation for employees who because of a disability are able to continue to work but at lower levels of pay than they enjoyed before becoming disabled.

16. EMPLOYMENT EQUITY PLANNING IN RESPECT OF PEOPLE WITH DISABILITIES

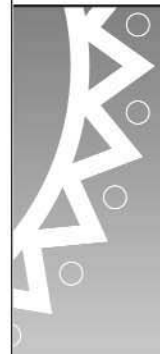
- 16.1. The Code of Good Practice for the Preparation, Implementation and Monitoring of Employment Equity Plans provides guidelines to employers and employees. This Code spells out additional measures to ensure that people with disabilities who are suitably qualified for a job can enjoy equal opportunities and are equitably represented in the workforce.
- 16.2. When designated employers are consulting in terms of Section 16 of the Act, they should use the opportunity to heighten the awareness of their employees of the value and importance of recruiting and retaining employees who have disabilities.
- 16.3. When an employer facilitates the establishment of a consultative forum in terms of Section 16 (1) (a) and (b) of the Act, the employer should take specific steps to promote the representation of employees with different disabilities in the forum.
- 16.4. If people with disabilities are under-represented in all occupational levels and categories in the workplace, the employer could seek guidance from organisations that represent people with disabilities or relevant experts, for example in vocational rehabilitation and occupational therapy.
- 16.5. When designated employers are compiling their workplace profile in terms of Section 19 of the Act, employees with disabilities may choose to either:
 - (i) identify their disability themselves; or
 - (ii) disclose their disability to their employer as long as their identity is kept confidential.
- 16.6. The workplace profile should include any employees who are not in active employment: for example employees who are receiving total or partial income replacement benefits while recovering from illness or disability.
- 16.7. When designated employers are setting targets, they should aim to recruit and promote people with disabilities at all occupational levels, as people with disabilities are often employed in low status work and tend to be promoted less often than employees without disabilities.
- 16.8. If employees with disabilities are concentrated in particular occupational categories, the employer should consider if its criteria for selection or performance standards could be adapted to facilitate employees with disabilities being employed in different categories.
- 16.7. Employers should regularly evaluate the relationship between employees and the working environment and where necessary provide appropriate programmes to prevent injury, illness and disability and promote health at work.



T

able of contents

1. Background to the module	2
2. Pre-workshop diagnosis	2
3. Practical considerations	2
4. Practical activities	3
5. Before you begin	3
6. Dealing with unit outcomes	3
7. Suggested time frames	3
8. Practical exercises	4
9. Allocation of time	4
10. Follow-up activities	4
11. Preface to the module	4
12. Dealing with participants' expectations	5
Unit 1: Understanding Management	6
Unit 2: Roles and responsibilities of Management	9
Unit 3: Managing Human Resources	11
Unit 4: Managing Finances and other Resources	14
Unit 5: Monitoring and Evaluation	15
13. Workshop evaluation	16
14. Conclusion	16





FACILITATOR'S NOTES:

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that this module is designed to cover all aspects of management in the context of education.

The module therefore seeks to equip women managers with the skills they need to effectively deal with management challenges in an educational setting. The module is structured such that it can be used as both a training manual and a resource book for women managers who, on their own, may use it to improve their skills in dealing with education issues as well as managerial issues.

Pre-workshop diagnosis is important for this module, as it will help determine the main area of workshop focus.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. For participants who have never received any form of training on management, it may be necessary to cover the whole module. As such, participants cannot effectively articulate their needs in relation to what is available as training materials.
- The first round of training should aim at covering the entire module.
- Use the pre-workshop diagnosis questionnaire designed for this module as a mechanism of determining the participants' beliefs regarding this subject.
- Use the same questionnaire at the end to determine whether participants' beliefs have changed because of the training received.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and generally with the topic of management. You should try to clarify your own understanding of the content before the workshop.
- Finally, you as a facilitator must feel reasonably comfortable with your own beliefs about the subject of management.
- Because the modules are in the OBE format, it also becomes important that time be set aside for practical exercises in order to determine whether the unit outcomes have been achieved.
- Participants need to complete the Workshop Evaluation Forms at the end of the whole module.

3. PRACTICAL CONSIDERATIONS

WORKSHOP MATERIALS

FACILITATOR TO BRING FOR REFERENCE PURPOSES THE FOLLOWING DOCUMENTS:

- The South African Schools' Act of 1997
- First Steps; School Governance Starter Pack
- Education Human Resources Management and Development – Guides for School Management Teams



- Module on Resource Management for Women Managers in Education
- The Public Financial Management Act
- The Women and the Law Module as well as Facilitator's Guide
- **Stationery:**
 - Paper and pens
 - Flip charts
 - Marking pens (different colours)
 - Prestik/Tape/Pins

PARTICIPANTS

Complete pre-workshop diagnosis questionnaires to determine the participants' level of understanding of the subject of management prior to training.

SEATING ARRANGEMENT

A round table type of arrangement or a boardroom type of arrangement with movable furniture components for small panel sessions is desirable.

NUMBER OF PARTICIPANTS

For personal development-type training interventions like this one, it is ideal to keep the numbers small, i.e. 20 at most, in order to create space for interaction with the group.

4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. Role-playing is the key practical activity that will be used in this module, the reason being that the participants will need to put into practice the theoretical information they acquire.

THE ROLE OF OBSERVERS

In role-playing sessions, participants who are not actively participating will observe the proceedings and give constructive feedback to the role-players.

5. BEFORE YOU BEGIN

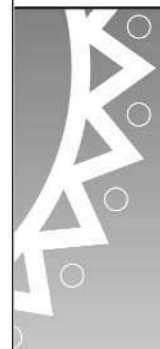
Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It covers the scope that the participants give themselves and others, and also the extent to which the participants are prepared to go in asserting themselves. This may require a serious paradigm shift on the part of the participants.

6. DEALING WITH UNIT OUTCOMES

Highlight the unit outcomes at the beginning of each unit and also at the end of the unit, before you move on to the next unit. Check on the extent to which the participants feel that the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

The least amount of time one can get by with is a full day for the whole module. This is premised on the notion that the DoE has not previously provided such training for staff.





8. PRACTICAL EXERCISES

The nature of this module calls for group involvement in doing practical exercises. While voluntary participation in group activities is ideal, participants who do not voluntarily participate should be encouraged to do so. The purpose of these activities is to allow participants to test their own understanding on the subject of management. Participant involvement is promoted via role-play and case studies.

9. ALLOCATION OF TIME

- Plan to dedicate at most 30 minutes per unit to content input and 15 minutes to practical exercises (8 minutes exercise & 7 minutes report-back).
- If some units provoke more issues for discussion, allow this within reasonable limits and make up for the lost time either by cutting on tea/lunch breaks or by spending less time on less-provocative units.
- Use your judgment to determine which units need greater emphasis.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual behaviour change. The exact nature thereof will be explained as part of the conclusion.

11. PREFACE TO THE MODULE

Explain that, much as it may seem that women are new to management, on the contrary, they have been managers from time immemorial. If we try to demystify management we come to realise that management is about organising people and resources, creating and maintaining systems and procedures, planning and strategising on how best to get things done. Management is about devising ways by which we can make things happen to achieve the desired effect.

As a facilitator, it is important that you use your knowledge of your home situation to ask and answer the following questions:

- Who ensures that everybody has eaten at home?
- Who prepares the children for school?
- Who prepares the husband's clothes for work?
- Who makes certain that homework is done?

Indicate that the list can go on and on. It is important to highlight the rural situation even more, because conditions may be more difficult and resources more scarce.

Because of the nature of the topic, where gender roles are vastly different and they magnify the already unfair conditions, these need to be highlighted even more to emphasise the conditions through which women have prevailed over the decades and even centuries.

It is important that the examples you use to illustrate any one point range from familiar ones to the not so familiar ones. Draw on the parallels that emerge between women's private and public lives. This is because some things come naturally to women and so are taken for granted. For example, most women are good organisers,



others are good planners and yet others are good with finances, etc. But because they have done some of these jobs effortlessly, unconsciously, constantly and routinely, they have never regarded their actions as a skill that can be developed and utilised in other environments such as their jobs.

To stimulate debate, introduce this topic to find out how the participants feel about the role of women in society. Use some home situations to illustrate this point and draw on the activities on the school front, for example, to illustrate this point.

It is important that you as a facilitator, point out that women are in leadership roles throughout society even though they themselves are not aware of it. Gender discrimination is responsible. Take time to discuss these issues and see how women feel and what prevents them from using their innate gifts and talents.

As a facilitator, help them realise that they already have some of the qualities of a good manager/ leader within themselves. The rest comes in the form of more training in skills and practice and more practice. Women have built up phobias about leadership roles, stemming from lack of confidence instilled in them by gender stereotypes.

A number of gender exercises and assertiveness training exercises will help dispel those myths and will contribute to putting their problems and stumbling blocks into perspective. Please refer to Gender Manuals first published by Oxfam, available from gender practitioners throughout the country.

12. DEALING WITH PARTICIPANTS' EXPECTATIONS

- At the beginning of each unit highlight the unit outcomes.
- Before moving to the next unit, check on the extent to which the participants feel the unit outcomes have been attained.
- Record whatever other outcomes arise, uncensored, on the flip chart.
- Tease out whether the group feels the outcomes listed are the same for both men and women.





UNIT 1:

UNDERSTANDING THE CONCEPT OF MANAGEMENT (p. 2)

EXPLANATORY NOTE

Highlight that the definition provided here is in the context of a business setting, where profit making is the ultimate aim. However, even in the home situation, the processes followed are the same - decision making, action, behaviour, etc. The only difference is that in the business setting, these processes are formally institutionalised.

FACILITATION PROCESS

- Divide the group into pairs and let them exchange views on the following topic:
"The recently passed legislation has afforded schools more autonomy."
- Find out from the group what this autonomy, which the recently promulgated legislation gives in the running of schools, means for women managers.
- What are their fears and what are their joys about this change?
- Are they looking forward to it?
- Let them report to the bigger group after about 20 minutes.
- You, as the facilitator, should guide the discussion to make sure that the legislation is correctly interpreted.

EXERCISE (p. 4)

FACILITATOR'S INPUT

- It is important that you, as a facilitator, provide a detailed background of the situation at schools, especially contrasting:
 - White schools versus Black schools, and
 - Rural versus urban schools, as far as the allocation of resources is concerned.
- Highlight as you go along, the objective of the Schools' Act of 1997, which aims to address these then prevailing imbalances.
- Find out from the group what the intended outcome here is. It could be to assess whether change is taking place and at what pace.

FACILITATION PROCESS

- Divide the group into pairs, taking turns to share their experiences/observations.
- The pairs should not come from the same institution/school.
- Allocate 5 minutes for each person to share her experiences of change as witnessed by her.
- Choose a few from different groups to report to the bigger group.
- Although the exercise has been approached as an individual exercise, it can also be made interactive, in which case you as the facilitator will need to request the services of a volunteer to record the inputs of the group.
- Pose the above-mentioned questions and wait for responses.
- Encourage the group to respond by indicating that there are no right or wrong answers, as answers will refer to different situations and as observed by different individuals.



ROLE-PLAY (p. 4)

The Problem: How do you, as a manager, win the support of your team?

The Scene:

You were recently promoted to a busy and growing department. There is some reluctance from the staff regarding your ability to manage. While they are not really offering resistance to you, they are less supportive and enthusiastic than you would like them to be.

After observing the way things are done at this department/school, getting to know the staff and understanding the personalities, you have decided to implement some much needed changes. You want to create a more cohesive work environment for everyone. Currently, each person performs his or her task irrespective of what anyone else is doing. For example, when one person is behind with her work, no one comes to her rescue unless you intercede.

You had successfully introduced the team concept in another company and now you want to implement some of those concepts here. Senior management has given you the go-ahead. Discuss with your group some of the likely causes of the staff's behaviour. What are the possible cures to the situation?

FACILITATION PROCESS

It is important that you, as a facilitator, make the group aware that one can introduce ideas and create opportunities, but one cannot make people work well together. The team concept has been introduced, modified, and improved upon in a number of settings. Do your research, know the players, be positive and sell the benefits that the employees will receive from working as a team. Sometimes teams do not work, and the reasons for this can be varied, some of which are within your control as a capable manager and others beyond your control. Timing is always a critical factor. For example, if several changes are being implemented throughout the organisation/institution at the same time, avoid introducing more than the employees are willing to accept.

This exercise can be done by the whole group exploring the possible causes of this situation.

Ask the group to suggest what the causes of this situation could be. You may like to consider the following as possible causes:

- Resistance to change. The employees may not see the problem and therefore it will be very difficult for them to see the need to implement any changes. Linked to this are the visible benefits that the change is likely to bring about.
- Women are measured differently from their male colleagues - this includes standards, tests, expectations and responses that are required of women.
- Poor communication may be a factor - the expectations, goals and results may not have been communicated clearly to staff, and hence the staff may have its own perceptions, different to the envisaged ones. Linked to this is the fear of how the change might impact on them and their lives. Also, there may be a problem of scepticism about the process achieving the desired results.





- Other considerations include trust. If you have cultivated a foundation of trust among the people who are to implement the changes, and if you have been a good communicator, listener and a fair judge, the process is likely to be much smoother.

Possible Cures

- Learn to conquer the fear of change.
- Know your audience well so that you can anticipate their likely responses and be able to adapt and respond in an acceptable manner.
- Create open communication, especially during times of change.
- Be confident about your proposals without reading too much into a situation than there is in it.



UNIT 2:

ROLES AND RESPONSIBILITIES OF THE DIFFERENT LAYERS OF MANAGEMENT WITHIN A SCHOOL (p. 5)

FACILITATOR'S NOTES

Make the group aware that change is not an easy process to complete. Instead, it is a long process with many hurdles to overcome. Make the group aware that the challenge is to know how to handle difficult situations when they arise, because such situations are inevitable, especially in a culture as diverse as that of South Africa. You as a manager, need to have good people skills, e.g. listening and responsiveness.

(Refer to the *Group and Team Dynamics* Module, where mention is made and tips provided on how to deal with different personalities and stress factors, as well as how to handle them).

THE ROLE OF THE PRINCIPAL (p. 5)

FACILITATION PROCESS

- There are no right or wrong answers here as the situations called for are varied, but it is important to note how observant and interested group members are on the matters pertaining to their schools.
- This will indicate that what the principal does affects them just as much.
- Discourage the group from mentioning the names of their principal, as some of the issues raised might be very sensitive.

THE ROLE OF THE SGB (p. 5)

FACILITATOR'S NOTES

- Mention three other roles that you feel the SGB should play.
- Carefully guide the group on these and make sure that they do not confuse the roles of the SMT and those of the SGB because a good working relationship between these two bodies should always exist.

CONTEXTUAL CONSIDERATIONS IN CHANGE MANAGEMENT (p. 7)

FACILITATION PROCESS

- Find out from participants what the vision of their respective schools/organisations is, if they have one.
- It is important that you, as a facilitator, are aware of the vision of the umbrella body (DoE), as the vision of the respective schools/organisations should flow from that of DoE.
- Ask the group what the difference between the school's vision and mission is?
- Share with the group the importance for organisations to have a vision. (It serves as a guiding star. Organisations need to review their vision now and again to see whether they are still on the right path towards reaching the desired end. This necessitates that they review their steps to see if they have not deviated, and if they have lost the path, to identify where they lost it so that they can again align their activities to reaching the desired end).





FACILITATOR'S NOTES

Highlight to the participants that since salaries are centrally paid, it is therefore very difficult to motivate for financial incentives. Instead, the school can consider such alternatives as making the environment very conducive to work in, offer staff long sabbatical leave, etc. You, as a woman manager, could also sacrifice from your own pay to buy staff little gifts, e.g. chocolates, etc. for work well done. It is important to remember that what goes a long way is the thought behind the deed and the act of recognition. This not only shows your appreciation, but also boosts the morale of the staff member in question and encourages others to work hard.

After the groups have shared their experiences, ask one member from each group to volunteer to share her experience of the situation highlighted in the exercise, after which the way in which the incident was handled can be analysed by the whole group.



UNIT 3:

MANAGING HUMAN RESOURCES (p. 7)

It is important that this topic, and the definition of human resources be thoroughly discussed before any concepts, exercises, etc. in this unit, are discussed.

As a facilitator, tease out from the group their understanding of the term and why it is important that this resource, unlike all the others, e.g. financial, etc. should be given the utmost care.

Highlight the point that this is the driving force behind all the other resources and in order that the other resources are managed efficiently, the human resources themselves need to be managed carefully.

It is important that the aspects involved in managing human resources entail attracting, maintaining and motivating employees. The pertinent issues and the recommended process to follow are further discussed below in detail.

ISSUES OF STAFF MANAGEMENT (p. 8)

FACILITATOR'S NOTES

Prior to going through this section, it is important that you, as the facilitator, go through the following documents:

- The Strategy Plan of DoE, with particular reference for the participants to the Provincial Strategy Plans, so they can contextualise their planning.

FACILITATION PROCESS

- Encourage discussion around this topic in order to assess the level of understanding of the participants.
- Do not allow the discussions to centre around one participant or even a dialogue for that matter.
- Focus the group on issues relating to this topic.
- If questions arise to which you do not have answers, record them on the flip chart and refer to the Strategy Plan document.
- Report your findings to the group before the next session begins.

APPOINTING HUMAN RESOURCE (p. 8)

FACILITATOR'S INPUT

For more detailed information, refer the group to the Recruitment and Selection Module.

BUILDING INDIVIDUAL AND ORGANISATIONAL PERFORMANCE (p. 9)

FACILITATOR'S INPUT

For more detailed information, refer the participants to the Balance Score Card from the Strategy Planning Document of DoE, and Provincial Strategy Planning Documents.



REWARDING EMPLOYEES (p. 10)

FACILITATOR'S INPUT

It is important to explain to the participants the relationship between satisfaction and high productivity.

MANAGING RELATIONSHIPS (p. 10)

FACILITATOR'S INPUT

Once professional relationships are established, they need to be managed, sometimes in the face of conflicting interests and priorities. The many relationships that a woman manager needs to manage include:

Relationships with the SGB.

Relationships with parents.

Relationships with learners.

Relationships with district office officials.

Relationships with service providers/suppliers, etc.

Managing relationships will require the woman manager to act with due care, putting first the interest of the school, district office, etc. This sometimes requires that the woman manager swallows her pride, not be guided by personal motives and may require that the woman manager establishes and maintains cordial and professional working relationships with people that she does not necessarily like. A professional approach guided by common sense, logic and respect for others will greatly help the woman manager in working with all types of people including those she does not like.

MANAGING CONFLICT (p. 10)

FACILITATOR'S INPUT

Conflict is inevitable where people are involved. Conflict is experienced even in the most intimate types of relationships. Depending on how conflict is handled, a great deal of good can come out of it. The best way to manage unnecessary conflict is to be sensitive to those behaviours, actions and attitudes that may lead to conflict. As a woman manager, strive to create a harmonious working environment and keep the lines of communication open, in order to avoid unnecessary conflict. When conflict does arise, use the tips on page 11 of the Training Manual to deal with conflict. Should conflict arise due to cross-cultural misunderstandings, refer to the Diversity Management Module.



EXERCISE (p. 11)

FACILITATION PROCESS

- Pose the question to the group.
- Take responses to the question, uncensored.
- Make judgments, guide the group on the inappropriateness of their responses and refer the group to tips provided below and to the Assertiveness Training Module.

TIPS:

Conflict management and conflict resolution are different concepts.

To manage conflict:

- Attend to the situation immediately.
- Use avoidance tactics.
- Handle people sensitively if you want to minimise conflict situations.

And to resolve conflict:

- Involve all the affected parties in the conflict resolution process.



UNIT 4:

MANAGING FINANCES AND OTHER RESOURCES *(p. 12)*

FACILITATION PROCESS

- Tease out the topic by finding out from the participants how they feel about the fact that schools are becoming more and more autonomous.
- Encourage all to participate in the discussion.

FACILITATOR'S INPUT

- Highlight to the group that with the newly promulgated legislation, and schools becoming Section 21 entities, this means that in the future, schools will have to run their own entities independent of the government.
- This calls for familiarisation on the part of staff with matters of finance, procurement, etc.
- This therefore means that each school will have to keep an eye on expenses incurred by the school versus income generated, i.e. use its budget as a guide and evaluate on a monthly basis whether it is meeting or exceeding the targets set. Further, the staff will have to devise strategies as to how they will generate their income, for example, they could use the SGB where all stakeholders are represented. Since the capital budget is derived from the annual allocations from Cabinet, this means that the national office will still handle staff salaries, whereas individual schools will attend to operational expenditure. One helpful idea would be to identify a nearby school that is well run and use it for mentoring purposes.

FACILITATOR'S INPUT

The Department of Education is ploughing in millions of Rands on projects that are meant to narrow the gap between the previously disadvantaged schools and the former Model C schools. The vastness of needs means that there is dire need to use the scarce resources efficiently, and as such the woman manager in education has a big responsibility of ensuring that the assets of the state both movable and immovable are well managed.

The procedures that have been put in place by the DoE and PEDs need to be strictly adhered to by the woman manager, e.g. the LSM Retrieval procedures, the requirement that schools keep asset lists, etc. This means that the woman manager needs to be uncompromising on these issues even in the face of opposition.



UNIT 5:

MONITORING AND EVALUATION (p. 14)

FACILITATION PROCESS

- Find out from the group if any of them have ever been involved in a monitoring and evaluation exercise. Find out what was being evaluated and what were the findings.
- It is important that you go through this section/unit with the group, section by section, encouraging questions as you go along.

GIVE THE FOLLOWING EXPLANATION

- All questions and the summary of the responses should be recorded on the board/flip chart by the facilitator or a volunteer.
- Emphasise the importance of evaluation and what it means, including the pitfalls of proceeding without evaluating what has been done previously, e.g.:
 - i. Reinventing the wheel.
 - ii. Not learning from the mistakes of the past.
 - iii. Not building on previous successes.
 - iv. Not linking present plans with past plans.
 - v. Not knowing whether ongoing projects are achieving success or not.
 - vi. Not knowing whether expenditure is in line with project milestones.
 - vii. Not knowing what the benefit of the project are.
 - viii. Not knowing whether the projects are achieving the set objectives.
 - ix. Not being able to pick up irregularities and correct them in good time.

FACILITATION PROCESS – EXAMPLE OF A MONITORING TOOL

Go over the example of a monitoring tool with participants.

Make sure the participants understand the tool.

Give one example from the following list of examples of objectives to groups of 5 and allow the participants to use the Monitoring Tool to develop a Monitoring Plan.

- Reduce instances of vandalism by 50% by end of 2003.
- Improve attendance rates of learners by 20% by 2004.
- Reduce the drop out rate of learners by 20% by the end of 2004.
- Improve parent participation in school matters by 25% by June 2004.
- Provide Employee Assistance Program to at least 50% of the educators in the district by June 2004.

FACILITATION PROCESS

- Give one example to each group.
- Request a volunteer to record the group's responses.
- Encourage the group to generate a monitoring plan based on the example assigned.
- The groups should record their input and appoint a spokesperson who will report back to plenary.
- Check the accuracy of the group presentation and invite the big group to amend inaccuracies
- Encourage each participant to do the exercise after the workshop using the objectives of one's immediate school, directorate, district, etc.



13. COMPLETION OF THE DoE WORKSHOP EVALUATION FORMS

All participants must complete these forms. Make an announcement at the very beginning and indicate that participants who will leave early, for whatever reason, still need to complete these forms.

14. CONCLUSION: WERE THE WORKSHOP OUTCOMES ATTAINED?

- Re-visit the flip chart where the intended workshop outcomes and expectations were written.
- Go over the outcomes one by one.
- Ascertain whether the participants believe the outcomes were achieved.
- Remind the group of any follow-up actions, time frames, etc. if any were agreed upon.
- If most of the outcomes were achieved, well done, and congratulate the group if this is the case.
- If most of the outcomes were not achieved, you as a facilitator, need to practice steering the ship in the right direction with whatever follow-up actions/activities you deem necessary. Your judgment is important here!
- Any information relating to the hosts about the venue should be communicated to them, as this will help them improve/appreciate what they provide.
- Include this in the process report.



T

able of contents

1. Background to the module	1
2. Pre-workshop diagnosis	1
3. Practical considerations	1
4. Practical activities	2
5. Before you begin	2
6. Dealing with unit outcomes	2
7. Suggested time frames	2
8. Practical exercises	2
9. Allocation of time	2
10. Follow-up activities	2
11. Broad aims of the module	3
12. Underlying assumptions	3
Unit 1: Understanding communication	4
Unit 2: Communicating with yourself	7
Unit 3: Principles of communication	9
Unit 4: Non-verbal communication	11
Unit 5: barriers to effective communication	13
Unit 6: Writing as a medium of communication	18
Unit 7: Explaining the various types of written communication	19
13. Workshop evaluation	19
14. Conclusion	19



FACILITATOR'S GUIDE: EFFECTIVE COMMUNICATION

1. BACKGROUND TO THE MODULE

As a facilitator, recognise that the training manual is designed to be both a training manual and a resource book for women managers who, on their own, may need to sharpen their communication skills. Hence, it will be a futile exercise to try to cover everything.

2. PRE-WORKSHOP DIAGNOSIS

- Send the pre-workshop diagnosis questionnaire to establish what training needs should be addressed in the workshop. Participants who have never received any form of training in communication may need the entire training module. Unless the training workshop extends over a day and a half, it may not be possible to cover everything in depth.
- 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 pre-workshop diagnosis.
- It is crucial that as a facilitator, you be reasonably comfortable with the content of the module and should try to clarify your own understanding of the content before the workshop.
- Because the modules are in the OBE format, it also becomes important that time be set aside for practical exercises to determine whether the unit outcomes have been reached.
- At the end of the whole module participants need to complete the Evaluation Forms.

3. PRACTICAL CONSIDERATIONS

WORKSHOP MATERIALS

- Training Module on Effective Communication
- Paper and pens
- Flip charts
- Marking pens (different Colours)
- Prestik/Tape/Pins

SEATING ARRANGEMENT

A round table-type or a boardroom-type of arrangement with movable furniture components for small group sessions is desirable

NUMBER OF PARTICIPANTS

For personal development training interventions like this one, it is ideal to keep the numbers small, i.e. 15 at most in order to create space for interaction within the group as well as self-analysis.



4. PRACTICAL ACTIVITIES

The purpose of practical activities is to allow participants to explore the content at a deeper level and to digest what it means for practical purposes. This makes practical activities a vital part of the training. Furthermore, the practice of requiring participants to report back also offers them an opportunity to polish their public speaking and communication skills.

5. BEFORE YOU BEGIN

Keep in mind that this training module goes beyond the acquisition of knowledge and skills. It is designed to question the participants' behaviour and habits when it comes to communication. It therefore becomes important that the facilitator approaches this task with the sensitivity it deserves, while also creating a platform from which participants can gain insight into their own counterproductive ways of communicating with others.

6. DEALING WITH UNIT OUTCOMES

At the beginning of each unit, highlight the unit outcomes and before you move to the next unit check on the extent to which the participants feel the unit outcomes have been attained. Record this on the flip chart.

7. SUGGESTED TIME FRAMES

The least amount of time in which one can get by with this module is half a day. This is premised on the notion that the facilitator is able to select the themes that best address the needs of most participants, and therefore will not cover everything. In cases where everything is to be covered, at least one full day will be needed.

8. PRACTICAL EXERCISES

The nature of this module calls for the involvement of small groups in doing practical exercises and sharing with the big group. The purpose of these activities is to allow participants to gain practical experience in communicating effectively within the secure training environment. This hopefully will be a starting point from which they begin to develop a habit of communicating effectively. The practical exercises further serve to balance facilitator input with participant involvement.

9. ALLOCATION OF TIME

- This depends on the themes/units to be covered.
- Plan for at least 45 minutes per unit across five units.
- Use your judgment on what is to be emphasised, based on the identified needs.

10. FOLLOW-UP ACTIVITIES

Indicate to participants that they will be tracked at six-monthly intervals to determine the impact of the training on actual behaviour change, and to determine the impact of the training via questionnaires.





11. BROAD AIMS OF THE MODULE

Communication is an important tool for everyone, whether in giving instructions, conveying messages, providing feedback or information for actions to be followed up, or for receiving information from a host of sources. The broad aim of the module is to expose participants to various communication media, sensitising them to choices of appropriate media types for given situations.

12. UNDERLYING ASSUMPTIONS

The whole module is premised on the notion that women can communicate effectively with others only if they:

- Are aware of the dynamics of communication.
- Are aware of what makes them less effective in communication.
- Know that they need to improve.
- Make an ongoing concerted effort to improve their communication skills.



SECTION A

UNIT 1:

UNDERSTANDING COMMUNICATION AND COMMUNICATION PROCESSES (p. 2)

FACILITATOR'S INPUT

UNIT OUTCOMES:

- Record the unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit workshop outcomes to determine the extent to which they have been achieved

EXPLANATORY NOTE

Communication is the successful transference of meaning from one person to another: Say what you mean and mean what you say. What needs to be emphasised is that communication involves a dual activity of both conveying and receiving messages.

This suggests that to communicate effectively, one must send accurate messages and one must also receive information accurately through effective listening.

There always have to be three elements in any communication process: the source which is the originator; the message, in other words, what is meant, and the channel, i.e. the modus operandi or the means by which the message is conveyed.

EXERCISE (p. 4)

Why do we communicate? How do you think communicating effectively can enhance the position of women managers?

FACILITATION PROCESS

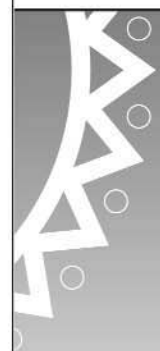
Consider the input of the participants.

Record on a flip chart.

Let the whole group agree on the appropriateness of the input, even though there may not be right or wrong answers.

FACILITATOR'S INPUT

The point illustrated in this section of the unit is that for communication to be effective, the channel of communication is as important as the source. In some instances, valuable messages are lost because of the inappropriate choice of communication channels. So, to communicate effectively, ask yourself the following questions:





- What do I want to say and why?
- Who is my target audience, i.e. who do I want to say this to?
- What channel should I use to say this? i.e. should I call a meeting, make a phone call, or write a memo? If you call a meeting to convey a message that can be effectively transmitted via a memo/telephone or e-mail, you are wasting time. Your audience may get the message, but the wastage involved means that you may have communicated effectively but not efficiently.

PRACTICAL EXERCISE (p. 5)

Theme: Your suggestions during a meeting are ignored. It is as though you were not even in the room.

FACILITATOR'S INPUT

Ask the participants to read the case study on page 5 of the Training Module and note the key points on the flip chart. Identify the cause of the problem in the case study and suggest the possible solutions through which the problem can be cured.

PROCESS

Record the group's input uncensored.

Tease out with the group on the issues listed.

Use group consensus to eliminate what the group sees as irrelevant.

POSSIBLE ANSWERS

You are not being heard. This does not necessarily mean that you do not speak up, but may mean that you are not assertive enough or that the group does not accept your style of communication.

You might be fighting an invisible microphone. It is common among hierarchical groups that one or more members are given access to an invisible microphone to allow messages to be heard. You may be denied access to this invisible microphone due to a number of reasons, one of which might be your gender. The consequences may be that those with good ideas are not listened to while the most obscure ideas and suggestions are easily sold by those who have access to this invisible microphone, including by simply stealing your ideas.

POSSIBLE CURES

Identify and understand politics of fear. This refers to your ability to persuade others and to be heard, especially in hierarchical environments.

Learn to speak up and be heard. In that way you will not lose out on missed opportunities and neither will the rest of the group.

Gain access to invisible microphones. This might be a long and tedious process that will be trying on your patience, but it is important to persevere.

Play the game to win territorial wars. It is not uncommon among peers to jockey for positions of power. Women are often less equipped to fight these battles because of their inclusive style and also because of their need to be connected with others and liked by all.



While communicating effectively is important for everyone, it is important to highlight the differences between men's and women's modes of communication. The whole aim of the exercise is to highlight the various communication styles of men and women. Tease these out from the group and find out the main differences between the way men and women communicate.

POSSIBLE REASONS

The speaker may have come on too strong, i.e. what you say is as important as how you say it. It could be that the first speaker was not coherent in trying to put across their point, and the latter speaker may have been able to use the right words and the correct tone of voice to achieve the impact. On the other hand, it may also be the case of the first speaker not being taken seriously because she is a woman.

EXERCISE (p. 6)

- | |
|---|
| • 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. |

FACILITATION PROCESS

Consider the input of the participants.

Record on a flip chart.

Let the whole group agree on the appropriateness of the input.





UNIT 2:

COMMUNICATING WITH YOURSELF (p. 6)

UNIT OUTCOMES (p. 6)

- Record the unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit workshop outcomes to determine the extent to which they have been achieved.

DEFINITION OF SELF-TALK (p. 6)

FACILITATOR'S INPUT

We all embark in self-talk. This largely assumes the form of internal dialogues when you ask yourself questions that you turn around and answer. Self-talk is largely internal, although you find that as a result of the stresses of modern life, people are inclined to do this literally.

LOOK AT THE FOLLOWING EXAMPLES AND INDICATE WHETHER THEY ENHANCE OR DIMINISH ONE'S ABILITY TO COMMUNICATE. YOU MAY USE THEM AS EXAMPLES IN YOUR FACILITATION PROCESS.

I KNOW I COULD NEVER DO THAT.

This certainly diminishes one's ability to communicate or do whatever the target of self-talk is because this unleashes a cycle of self-doubt which leads to diminished effort, which in turn, leads to lack of motivation.

I AM USELESS.

Same as above.

WHY WOULD ANYONE LISTEN TO ME?

This definitely is a recipe for a disaster in any communication setting. If you do not believe in yourself, no one else will believe in you.

I AM NOT GOOD ENOUGH - WHY SHOULD I BOTHER?

Same as above.

I AM AS GOOD AS ANYBODY ELSE.

If you are confident in yourself you project this to others, who in turn, develop confidence in you.

I AM PREPARED, SO I CAN EXPECT TO DO WELL.

A high degree of confidence is displayed here and others are likely to be confident in you in return.

IF I MAKE A MISTAKE IT WILL NOT BE END OF THE WORLD.

You give yourself permission to make mistakes and if you do make one you are prepared to deal with it in a rational manner.



LISTENING TO YOUR INNER VOICE (p. 6)

FACILITATOR'S NOTES

Everyone has an inner voice that they listen to with varying degrees of attentiveness. Our actions actually reflect the inner voice. The inner voice usually indicates lack of self-confidence, poor self-esteem or a general feeling of inferiority. The inner voice plays the following roles:

Self denigration	<i>versus</i>	Elevating self-confidence
Creating anxiety	<i>versus</i>	Keeping calm
Encouragement	<i>versus</i>	Discouragement
Cheer-leading	<i>versus</i>	Giving up

FACILITATOR'S INPUT

- Invite the participants to give examples of the types of self-talk listed above.
- Should participants have difficulty in following the task, you can use examples listed below.
- The possible answers could go as follows:
 - When I could not answer the question, I made such a fool of myself (self-denigrating)
 - I know I am not capable of getting that job, why am I even wasting my time? (creating anxiety)
 - I will make it. If I could pass my previous exams despite the hardships I went through, what should make me fail this time? (positive encouragement)
 - Much as I know the other staff members will not be brave enough to support me on this issue, I will raise it anyway. It is my duty to do so. If I do not do it, nobody will (cheer leading)
 - I know I am capable of doing this presentation. After all, I have addressed bigger audiences than this (self-encouragement)
 - Since I have already indicated my preference to him, I just have to confirm it more firmly this time (self encouragement)
 - Can you imagine what will happen to you if you run out of words during the presentation? Everybody will jeer at you and you will never be respected again (giving up)
 - I am not going for any interviews. After all, I am working and I earn sufficient money to run my household - what more do I want? (self-discouragement)





UNIT 3:

PRINCIPLES OF COMMUNICATION (p. 8)

UNIT OUTCOMES (p. 8)

- Record the unit outcomes on a flip chart.
- Check whether there are outcomes from the list contributed by participants that relate to this unit.
- Highlight expectations that relate to the unit.
- Before concluding the unit, revisit workshop outcomes to determine the extent to which they have been achieved.

TIPS:

PRINCIPLES OF COMMUNICATION

Look at each communication situation as unique (p. 8)

Implications: It does not matter how familiar you are with the source of the communication. The message is always different. The difference in the message can be conveyed verbally or even via body language.

The key to success in communication is feedback (p. 8)

Implications: Be attentive to verbal/non-verbal feedback from others. Use both verbal and non-verbal channels when giving feedback.

Face-to-face communication is the most effective (p. 8)

Although face-to-face communication is effective, it often loses its impact if not well thought out, i.e. do not call a meeting if the objective of the communication encounter can be achieved via a memo.

Distractions can garble your message (p. 8)

To maximise your impact in getting your message across, make sure that the physical environment in which you communicate for formally planned communication sessions, e.g. meetings, promotes effective communication. For example, the place is not noisy, it is not located in the hub of distractions such as passing learners, and it does not overlook a sports field, swimming pool, etc.

FACILITATOR'S INPUT

Tips are useful means of improving your communication. Pay careful attention to what is being communicated to you by asking yourself the following questions:

- i. Do I understand the subject under discussion?
- ii. Have I asked for clarification where I am lost?
- iii. Do I have enough background to follow the issue being discussed?
- iv. If I am the source of communication, have I given enough background for my audience to grasp the issue under discussion?
- v. Am I presenting the speech/talk in a manner that is clear?



- vi. Is the language I am using in line with the level of understanding of my audience, e.g. language used to communicate with learners versus language used to communicate with colleagues, etc?
- vii. Am I paying close attention to non-verbal cues given by my audience as we move along?
- viii. Am I pacing my speech such that it is easy to follow, i.e. not too fast or too slow?

AVOIDING SELECTIVE ATTENTION OR PERCEPTION (p. 9)

Selective attention is a matter of interplay between the message being conveyed, i.e. what is objectively being said in the context of personal motivational issues that makes the recipient of the message hear what he/she wants to hear rather than what is said. Selective attention can also be caused by:

- Focussing on one aspect of the message to the exclusion of the rest of the message.
- A lack of trust.
- Incomplete perception, e.g. when one catches the tail end of the message.





UNIT 4:

NON-VERBAL COMMUNICATION (p. 11)

UNIT OUTCOMES (p. 11)

- Record the unit outcomes on a flipchart.
- Invite the participants to indicate whether there are other outcomes that have been left out.
- Highlight those outcomes that are in line with what the unit seeks to achieve.
- Before concluding the module revisit the unit outcomes.

DEFINITION OF NON-VERBAL COMMUNICATION (p. 11)

Draw the participants' attention to the wide range of gestures, signs, facial expressions, etc. that constitute non-verbal communication.

UNIVERSAL VERSUS CULTURE-SPECIFIC FORMS OF NON-VERBAL EXPRESSION (p. 11)

Ask the participants to give universal forms of non-verbal communication.

Check the universality of what is given by determining the extent to which all participants understand the meaning given to each gesture, sign, facial expression given.

Ask participants from different cultural groups to share with the group at least two non-verbal expressions that are specific to their cultural groups as well as those that are universal.

GENERAL PRINCIPLES OF NON-VERBAL COMMUNICATION (p. 11)

FACILITATOR'S INPUT

- Because of the general ambiguity of non-verbal language, it is even more important to avoid jumping to conclusions.
- What makes non-verbal language complex is that it is:
 - Multi-channelled, including facial expressions, eye movements, gestures, body position.
 - Spontaneous, i.e. uncensored.
 - Ambiguous, i.e. regional/culture-bound.
 - Heavily influenced by culture, i.e. both bigger culture and sub-cultures, e.g. taxi signs.
 - May be out of sync with the spoken word.

IMPLICATIONS:

- Interpret signs with caution, especially where the possibility of cross-cultural interpretation exists.
- In cases of possible cross-cultural interpretation, seek verbal clarification.
- Always check your own understanding by saying, for instance: "I notice that you frowned when I said... "Does that mean you did not understand what I meant?"
- Pay attention to both verbal and non-verbal cues. Non-verbal communication is spontaneous and may be a reflection of true feelings.
- Beware of the fact that certain individuals can manipulate their non-verbal expressions, e.g. poker face.



- When in doubt always ask for clarification.
- Beware of non-verbal behaviour that can be construed as having sexual connotations.

FUNCTIONS OF NON-VERBAL COMMUNICATION (p. 14)

Actions speak louder than words. In cases of conflict between verbal and non-verbal communication, actions are often a sincere reflection of emotions.

Ask participants to share, in a big group session, instances in their work environment where they find non-verbal communication more informative than the spoken word.

EXAMPLES:

FACILITATOR'S INPUT

- Ask about 5 participants to individually come forward and make facial expressions.
- Ask the group what they understand is communicated by the facial expressions demonstrated.
- Is there any consensus among participants as to what these facial expressions mean?
- Are these forms of body language universal or culture-specific?





UNIT 5:

BARRIERS TO EFFECTIVE COMMUNICATION (p. 14)

FACILITATOR'S INPUT

- Record the unit outcomes on a flipchart.
- Invite participants to share what they expect to get out of the unit.
- Highlight those outcomes from the participants' list that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

WHAT IS A COMMUNICATION BARRIER? (p. 14)

FACILITATOR'S INPUT

A barrier is anything that prevents you from attaining a desired state or situation or object. In the case of communication, such barriers would prevent you from giving or receiving messages.

When dealing with barriers to effective communication, we focus on individual habits and behaviour that habitually cause us to communicate ineffectively. Transient external factors and environmental situations are excluded from the list of barriers.

HABITS THAT CONSTITUTE BARRIERS TO EFFECTIVE COMMUNICATION (p. 15)

People create more communication barriers by doing the following:

- Not taking the sender of the message seriously.
- Second-guessing the sender, e.g. I already know what she will say.
- Prematurely closing.
- Not listening as a status symbol, e.g. why should I waste my time listening to her, she's my subordinate.
- Becoming distracted by the sender's habits and tactics.
- Prejudging the content of the message.
- Over-reacting to key words or phrases.
- Locking into one's own viewpoints in an argument (This will be dealt with at length at a later stage).
- Listening for too much detail.
- Wasting the difference in time between thought and speech.
- Being defensive.



EXPLANATORY NOTE TO THE FACILITATOR

The following is a list of examples that illustrate the above communication barriers. Use these as a yardstick against which to assess the input of the participants. Participants are to be invited to give examples illustrating the scenarios listed above.

Not taking the sender of the message seriously, e.g. Whatever you say/decide sir!
Second-guessing the sender, e.g. I know what he is going to say " It is our intention to help our learners (achieve their full potential). The listener fills in the blanks and actually misses out in all cases where a different message is being conveyed.
Prematurely closing, e.g. While someone is still making a point you rush in and say "Fine ...fine" even before understanding the point being made.
Not listening as a status symbol, e.g. What can clerks possibly tell me? Why should I waste my time listening to her?
Becoming distracted by the sender's habits and tactics, e.g. The sender of the message waffles through the presentation and ends up leaving you wondering: "What is he thinking?"
Prejudging the content of the message, e.g. characterised by the attitude that so and so cannot tell you anything new.
Over-reacting to key words or phrases.
Locking into their own viewpoints in an argument, e.g. This is characterised by deciding in advance about your standpoint and sticking to it no matter how overwhelming the evidence against that viewpoint.
Listening for too much detail, e.g. When you lose sight of the essence of the meaning because you look at details in isolation from the context.
Wasting the difference in time between thought and speech, e.g. Fail to keep up with the speaker's pace and take too long to decode what is said.
Being defensive, e.g. You decide that you are going to stand by your wrong viewpoint because you feel you have to save face.

FACILITATOR'S INPUT

The nature of the exercise requires introspection. Invite the participants to think of an argument that they have had with someone, i.e. colleague, friend, spouse, child, clerk at the municipal office, post office, bank teller, etc. They must record their assessment in their workbook/training manual. The purpose of this exercise is to invite participants to reflect and apply the information gained and in the process work out a practical way to improve their communication.



WHAT IS SELF-DISCLOSURE? (p. 16)

Self-disclosure is when people volunteer intimate details of their personal lives with others. Some people are more open than others. There is also an element of cultural influence in self-disclosure e.g. when people from African cultures ask "How are you?" implying the plural form. This often leads to a lengthy description that can be interpreted as too much self-disclosure.

WHY DO PEOPLE ENGAGE IN SELF-DISCLOSURE? (p. 16)

Self-disclosure has the following benefits:

- It makes people feel better after talking about what bothers them.
- It helps them solicit views and advice about situations they have not faced before
- It could be that people have developed a habit of disclosing personal information about themselves.
- It could be used to manipulate others into feeling sorry for them.
- It could be a strategy to develop intimacy and closeness.

WHEN SELF-DISCLOSURE IS INAPPROPRIATE?

- When it is too much too soon.
- When it entails very personal intimate details of one's life.
- When it happens not with the select few confidantes but is shared with everyone.
- When the motives for sharing such personal information are questionable.

HINTS TO WOMEN MANAGERS

- Self-disclosure from a manager to subordinates creates a fertile ground for gossip-mongering.
- Indiscriminate self-disclosure is bound to haunt you.
- Ideally, separate personal life from work life.
- Manager should lead by example.
- Information shared by subordinates in confidence should be kept as such.
- Lead by example.

THE COMPLEXITIES OF SELF-DISCLOSURE

In the following, indicate whether the self-disclosure is appropriate/not appropriate and what the possible motive could be.

An administrative assistant at the district office talks to the male district official at the municipal offices and tells him that she has had a miscarriage.

- Is this a case of self-disclosure?
- Is this self-disclosure appropriate?
- What could the possible motive be?
- How should the male official respond?



RECEIVING PARTICIPANT INPUT

FACILITATION PROCESS

- Tackle one question with the big group.
- Record inputs uncensored.
- Get group consensus by going over the list - eliminating points that the group does not agree on.
- Tackle one question at a time.

ANSWERS:

- This is a severe case of misguided self-disclosure.
- This is totally inappropriate, inconsiderate and disruptive.
- The motive could be to open up under the misguided notion that self-disclosure is the same as psychotherapy.

The district official will need to be open and honest about what the self-disclosure is doing to her. The individual concerned is clearly troubled and emotionally fragile. The person handling the matter will have to handle it with sensitivity, such that he does not push her over the edge.

PROCESS:

- Politely suggest that she needs professional help because you do not have the skills necessary to assist her.
- Get her the necessary information on professionals to assist her.
- Suggest to her that you regulate her contact with her such that she also has space to deal with the challenges posed by professional help.

IN CASES OF BOUNDARIES OVERSTEPPED

You want to be as supportive as possible without allowing yourself to be either overwhelmed or manipulated.

Protect yourself by sending non-verbal hints that you are not interested, e.g.:

1. Reduce eye contact.
2. Appear puzzled/pained.
3. Appear agitated.
4. Find an excuse to terminate long drawn-out telephone conversations.
5. Remind her of the terms of agreement.

You are a departmental official working at the regional office. In the course of school visits you met a lady principal who told you how proud she was of the work you were doing. She asked if you would not mind being her mentor, to which you agreed, assuming that the guidance she would be seeking would be largely on professional issues. As it turned out, she was a very troubled woman with a traumatic past. Before you knew it, you found yourself consumed by her problems, and that was rendering you dysfunctional as she sometimes called you four times a day!



- Is this a case of self-disclosure?
- In what way is this dysfunctional?
- What could be the possible dynamics in this situation?
- How would you go about cutting ties with this individual?

PRACTICAL EXERCISES (p. 17)

Think of a time when you found yourself in an argument with someone; 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 through active listening?
- What results would you have obtained from this situation?

EXERCISE (p 17)

FACILITATOR'S INPUT

Steer the discussion in the direction of looking at the following:

- Your understanding of the message.
- Is the channel being used an appropriate one?
- The people in the conversation seem to be of different cultures, could the signs being used mean the same to both cultures?
- Is the context right?
- How to clarify your own understanding about what you are observing?
- Was the verbal behaviour of both participants consistent with their non-verbal behaviour?

FACILITATION PROCESS

- Ask participants to volunteer to relate similar experiences that they have observed.
- What were the findings in each of the situations given?
- Was there any consistency in the meanings between the sender and the receiver of the messages?
- Get volunteers to act a similar scene in which both verbal and non-verbal signs are used. Try to get participants from similar cultural backgrounds and from different ones.
- Record the outcomes and compare the two different situations.
- The rest of the group observes the proceedings and give the role-players constructive feedback.
- Possible scenario.

FACILITATION PROCESS

- Observers observe the proceedings and make notes.
- Tackle one question at a time.
- Record the input of individual observers on the flip chart without censoring it.
- Revisit the list, seeking group consensus, eliminating what the group does not agree on.
- Once group views are recorded on each question, move to the next question.



UNIT 6:

WRITING AS A MEDIUM OF COMMUNICATION *(p. 18)*

FACILITATOR'S INPUT

- Record the unit outcomes on a flipchart.
- Invite participants to share what they expect to get out of the unit.
- Highlight those outcomes from the participants' list that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

WHY IS WRITING IMPORTANT? *(p. 18)*

FACILITATOR'S INPUT

The importance of writing in a professional environment cannot be over-emphasised. What one writes and circulates has the potential to far outlive the person. It is therefore important to plan your writing carefully and if in doubt of what you have written, ask somebody else to read your document with a critical eye and give you feedback. However, remember that writing well, as is speaking well, is a skill.

TARGETING ONE'S AUDIENCE *(p. 18)*

The battle for writing well is won once you know who your target audience is. Strive at all times to find out as much as possible who your audience is, how much do they know of the subject you are communicating, and what do they expect of you.

EXERCISE *(p. 19)*

Do you have a communication policy in your department? If so, does it provide adequate guidelines on how, when, where and why information should be disseminated to all staff levels of staff? Improve areas of improvement in your policy.

FACILITATOR'S INPUT

Bring your communication policy document to the workshop. Look at it carefully and note its flaws and highlights. Present it to the participants as it is, and open a discussion on it. If you do not have one, draft one for your section and present it for discussion.



UNIT 7:

EXPLAINING THE VARIOUS TYPES OF WRITTEN COMMUNICATION *(p. 20)*

FACILITATOR'S INPUT

- Record the unit outcomes on a flipchart.
- Invite participants to share what they expect to get out of the unit.
- Highlight those outcomes from the participants' list that relate to the unit.
- Before concluding the unit, revisit the unit outcomes.

EXERCISE *(p. 20)*

Using the guidelines on writing mandates/instructions, develop your own set of rules and use them to generate a mandate to your subordinates.

FACILITATOR'S INPUT

Mandates/instructions are often written with a view to communicate something urgent. They normally require a response from the recipients. The response could be written, verbal or a change in doing things or attitude.

When going through the mandates prepared by the participants, make sure that the language used, while emphatic and to the point, is not belittling or embarrassing. The recipients must always feel that they are respected irrespective of what is being communicated to them.

REPORTS *(p. 23)*

FACILITATOR'S INPUT

Look at the various types of reports listed on page 23 of the Training Manual. Select a type of report that most of the participants are likely to have written. Let them think of those reports and compare them, both in presentation and layout, with what is suggested in the Training Manual.

13. COMPLETION OF THE DOE WORKSHOP EVALUATION FORMS

All participants must complete these forms. Make an announcement at the very beginning and indicate that those who will leave early, for whatever reason, still need to complete these forms.

14. CONCLUSION: WERE THE WORKSHOP OUTCOMES ATTAINED

- Revisit the flip chart where the intended workshop outcomes and expectations were written.
- Go over the outcomes one by one.
- Ascertain whether the participants believe the outcomes were achieved.
- Remind the group of any follow-up actions, with time frames if any were agreed upon.
- If most of the outcomes were achieved, well done, and congratulate the group if this is the case.



- If most of the outcomes were not achieved, you as the facilitator need to practice steering the ship in the right direction with whatever follow-up actions/activities you deem necessary.
- Any information relating to the host about the venue should be communicated to the responsible persons, as this will help them improve/appreciate what they provide.
- Include this in the process report.

