

**Quarterly Technical Progress Report**

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**International Power Institute**

**Quarterly Report for the Period**

**July – September 1998**

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**MASTER**

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## **INTERNATIONAL POWER INSTITUTE'S QUARTERLY TECHNICAL**

### **REPORT FOR JULY – SEPTEMBER 1998**

#### **I. PROPOSAL DEVELOPED FOR ESKOM**

In response to the June 2, 1998 Request for Proposal (RFP) from the ESKOM Power Company in South Africa, Morehouse College/IPI developed and transmitted a proposal for ESKOM for the purpose of training ESKOM union leaders. The training program is designed to meet several objectives. These are summarized as follows:

- Reduce Union/Management conflict by:
  - Identifying pressing problems;
  - Developing the structure for orderly process in addressing problems and negotiating differences; and
  - Helping union leaders identify their responsibilities.
- Prepare organization for potential changes (e.g. competition, restructuring or privatization) by:
  - Enhancing union leaders knowledge and understanding of basic economics and world trends in the electric utility industry, labor practices, union operations; and
  - Strengthening union leaders' ability to "lead".
- Strengthen and stabilize ESKOM's union organization by:
  - Developing union leaders' capabilities;
  - Providing union leaders with understanding and practice in labor relations practices;
  - Identifying needs for further development and training; and
  - Enhancing the credibility of union leaders.
- Provide ESKOM, labor leaders and South Africa capability for a leadership role in Southern Africa labor relations by:
  - Demonstrating a role model of union/management relationship development; and
  - Using a basic program as a "replicable" model for other industries and other countries

This proposal, if accepted, could provide IPI with an entry point for working with ESKOM on other energy problems and issues. The proposal is enclosed as an attachment to this report.

## II. AFRICA POWER CONFERENCE AND EXHIBITION

Planning for the March 3-4, 1999 Africa Power Conference is under way. The Honorable Hazel O'Leary, former Secretary of Energy, has agreed to provide the keynote address for the conference. It will be held in Sun City, South Africa and promises to provide the most extensive coverage of power generation and distribution issues ever presented on the African continent.

## III. NEW ADVISORY BOARD MEMBERS

Two new members were invited to join the IPI Advisory Board. Mr. Jack K. Edwards is Executive Vice President and Group President of International Power Generation for the Cummins Engine Company, Inc. Cummins is one of the major manufacturers of diesel engines for transportation and stationary power generation. In addition, Mr. Alphonso Jackson, the president of CSW-Texas, a medium sized energy company that is located in Southwest Texas has been invited to join the Advisory Board.

## IV. HIRING IPI DEPUTY DIRECTOR

IPI has filled the position of Deputy Director with the hiring of Dr. James H. Porter. He joined the IPI staff on September 23, 1998. Dr. Porter is a retired chairman and C.E.O. of UV Technologies Inc. and Energy and Environmental Engineering Inc. of Boston, Massachusetts.

He received a B.S. in Chemical Engineering in 1955 from Rensselaer Polytechnic Institute (R.P.I.) and on Sc.D. in Chemical Engineering from the Massachusetts Institute of Technology in 1963. In his early career his experience was in petroleum refining and computer aided design and simulation of petroleum refining operations. He gained this experience with the ESSO Standard Oil Co. (now EXXON) in the period between 1955-1958 and with the Standard Oil Co. of California (Chevron) between 1963-1967.

Between 1967-1971, Dr. Porter served as manager of Design for Abcor Inc. (now KOCH Engineering) involved with the development of gas and liquid membrane separation processes, of membranes for artificial lungs and kidneys, and production scale liquid chromatography systems. In 1971 he joined the Chemical Engineering Faculty at M.I.T. as an Associate Professor. Among his many projects at the Institute, he was engaged in the design and simulation of Advanced Fuel to Electric Power Conversion Systems. Atmospheric and Pressurized Fluid Bed Combustion Systems, Gasification-Hot Gas Turbine Combined Cycle Systems, Magneto-Hydrodynamic Topping Cycles etc. were all included for consideration for improving Fuel to Electric Energy conversion efficiencies. Between 1976-1979 Dr. Porter joined the Energy Resources Co. where he

served as Vice-President of the Energy Division and supervised the design and construction of fluid bed systems for combustion and pyrolysis.

From 1979 to 1998 Dr. Porter founded both Energy and Environmental Engineering (E<sup>3</sup>I) and UV Technologies Inc. (1994) from which he just retired. E<sup>3</sup>I developed the Staged Fluid Bed Combustor and provided technical assistance to North African and Middle Eastern countries, through contracts let by U.S.A.I.D., in considering both fuel and technology alternatives to petroleum for powering an economy. E<sup>3</sup>I performed work in Morocco, Egypt, Turkey, Yugoslavia, and Syria. UV Technologies developed the UVCATOX process for oxidizing toxic organics in aqueous waste streams. His broad range of experience in technology development, management, and international affairs greatly enhance IPI's capabilities.

#### V. PLANS FOR ADVISORY BOARD MEETING

Plans have been made for the second formal Advisory Board Meeting to be held on December 8<sup>th</sup>, 1998 in Orlando, Florida to help further refine the IPI's overall strategy.

**INTERNATIONAL POWER INSTITUTE  
MOREHOUSE COLLEGE**

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**Proposal for Training ESKOM  
Labor Union Leaders**



**International Power Institute \* Morehouse College**

**Proposal for Training ESKOM Labor Union Leaders**

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**EXEC. SUMMARY**

## **Executive Summary Of IPI Proposal To ESKOM For Short Term Training For ESKOM Union Leaders**

### **Introduction**

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The International Power Institute (IPI) at Morehouse College is pleased to respond to ESKOM's request transmitted on 2 June 1998. In the response that follows, IPI has organized an exceptional team to design and create a Short Term Training Program for ESKOM Union Leaders which will last four weeks and take place at a location in South Africa to be designated by ESKOM. Our recommendation, to contain costs, is to hold this training at the ESKOM Training Center.

This proposal envisions a group of no more than 25 union leaders to be trained at the same time but the program could be expanded to accommodate up to 40 trainees. The program is designed around interactive training with lectures followed by discussion, case studies, trainee work groups, homework assignments and two field study visits. Also, the program is designed to have a number of ESKOM management people join the course for one day in the second week and one day at the end, in each case after a half day of preparation in separate sessions from the union leaders, to share with the trainees expectations and, at the end of the program, their course experiences.

In addition, IPI has prepared a follow on proposal for a Long Term Training Program. This LT program is specified in less detail but can be expanded based on future discussions with ESKOM management.

### **Training Program Objectives**

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The training program is designed with the following objectives:

1. Determine and identify the most pressing problems facing ESKOM Union Leadership in their relationship with management;
2. Instill in the union leadership a heightened sense of purpose and willingness to take ownership of a process that will increase effective outcomes of meaningful, good faith bargaining;
3. Develop skills and experience leading to improved union administration;
4. Enhance realistic expectations and improve process knowledge to facilitate future labor negotiations and grievance proceedings;
5. Provide participants with enhanced skills and knowledge to develop and/or strengthen a functioning, democratic work culture and structure internal to the union.

## **Subject Material**

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The course content will span topics from basic instruction in such as economics and utility operations to more complex issues such as evolving labor relations theories and practices and global movement toward privatization of electric utility operations. Listed below are the principal topic headings contained in the course:

- US/South African Labor Relations Trends
- Union/Trainee/ESKOM Expectations
- Economics
  - Basic Principles
  - Macro Theory
  - Micro Theory
- Energy
  - Introduction to Basic Principles
  - Utility Operations
  - Competition & Globalization
  - Restructuring & Privatization
- Labor Relations
  - Current & Developing Labor Theories
  - Workforce Diversity
  - Comparative Study
  - High Performance Work Forces
  - Mutual Gains Bargaining
- Critical Issues
  - Union Function/Responsibilities
  - Union Democracy
  - Workplace Education
  - Literacy Issues & Skill Enhancements
  - Worker Displacement & Manpower Management
  - Process Change in the Workplace
  - Comparative Study
  - Defining Leadership
  - Leadership Development
  - Women in Unions & as Leaders
- Site Visits

Exhibit A shows the layout of the proposed four weeks of sessions. In the Section of the Proposal "Four Week Training Program", there is a more detailed outline of activities for each day.

It should be particularly noted that the proposal includes having a select management team join the training group on two days. The first time is toward the beginning of the sessions to learn what the trainees identify as their needs and concerns. Also, it gives management an opportunity to voice their opinion on issues that the program should cover. There is scheduled a half day prior to this joint session for the management people to learn about what is proposed to be covered in the course and to voice their opinions to the staff on issues as the management perceives them. Finally, on the last day of the sessions, the management group will be asked to join in the session with the trainees to learn what has been accomplished and to hear the Union people's concerns and issues.

## **Deliverables**

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IPI will be responsible for a number of deliverables in addition to putting on the training program. These include the following:

- Curriculum Development — A detailed outline for each training session will be developed by the IPI staff for use by the trainers and to assure full coverage of the subject matter detailed in the course outline.
- Training Manuals — The IPI staff will produce a training manual for each course participant. The manuals will be divided by subject matter and will contain the following materials:

worksheets	daily work	small group projects	demonstrations
special projects	homework	glossaries	library references
graphs	charts	quizzes	

- Computer Self-test — These automated tests will be available for trainees to evaluate their progress.
- Evaluation Devices — These evaluation devices will include:

daily work	homework assignments	test/quizzes
reassessment tests		

At the end of the training program, IPI will perform the following functions:

- Hold a debriefing of training instructors;
- Conduct an audit of expenditures;
- Prepare a final report on the training project including evaluations, summaries of achievements and recommendations. A copy will be submitted to ESKOM.

## **Cost of Program**

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In designing the program, it is assumed that ESKOM will furnish the facility in South Africa where these training sessions will be held. Also, it is assumed the ESKOM will provide food and

other incidental expenses during the sessions and transportation as needed for the operation of the training sessions. These items are not included in the budgeted expenses below.

For the remaining expenses—including preparing all materials for the training sessions, training the trainers, transporting the trainers to South Africa and back and paying the trainers expenses—IPI requests payment of \$ 285,000. A detail of this budget appears in the section “Short Term Training Program—Budget.”

*budget removed.*

### Long Term Training Program

Also included in the material is an outline of a follow-on course proposal termed the “Long Term Training Program.” This would provide selected union people with an intensive course lasting 3 months and include training both in South Africa and in the U.S. If ESKOM would like a more detailed proposal, IPI would be pleased to develop such a proposal after it has had a chance to discuss the elements of the program with ESKOM management and union leaders.

IPI proposes a budget of \$620,000 but is subject to revision when the details of the proposed training program are further discussed. A detail of this budget appears in the section “Long Term Training Program—Budget.”

*budget removed.*



## Morehouse College and Objectives of Training Programs

### **Brief Description of Morehouse College**

Morehouse College is an independent four-year fully accredited historically black liberal arts college for about 3,000 men, with a faculty of some 170 full-time professors, located a mile west of downtown Atlanta, Georgia, the cultural and economic center of the South. Dotted with a mixture of old and an increasing number of new buildings, the 55-acre campus forms part of the Atlanta University Center (AUC), the largest private educational complex with a predominantly African-American enrollment in the world.

Since its establishment in 1867, Morehouse has been providing young men with the educational and inspirational experiences that have built leaders for the U.S. and world society. Morehouse is committed to the continuation of this tradition. As the nation's only historically black all-male college and in recognition and appreciation of its origin, Morehouse assumes a special responsibility for teaching students about the history and culture of black people. The College seeks to develop leaders who will be qualified and committed to solving the problems of society with special attention given to those of African-Americans. Inspired by the legacy of distinguished alumni, presidents, and professors—persons who have wrought significant social changes—the College supports and encourages programs which benefit all people and which seek to eradicate discrimination and injustice.

As a private four-year residential liberal arts college, Morehouse provides an educational program in the arts and humanities, the natural sciences and mathematics, and the social sciences and business. Morehouse is firmly committed to attracting and enrolling students of high caliber from a wide variety of educational and economic backgrounds and providing them with learning and leadership development opportunities. In preparing students for admission to graduate or professional school or for immediate entrance into professional careers, the College teaches students to think clearly and critically, to make logical and ethical judgments and to communicate effectively with others. In addition, Morehouse instills in students a commitment to service. Morehouse emphasizes the continuing search for truth as a liberating force and subscribes to the philosophy that in order to be educated, men must learn about themselves and about their world in all its varied aspects. Thus, the Morehouse student is both challenged and prepared to influence his world positively.

### **Mission Statement**

“...In recognition and appreciation of its origin, Morehouse seeks to develop leaders who will be qualified and committed to solving the problems of society with special attention being given to those of African-Americans. The College supports and encourages programs which benefit all people and which seek to eradicate discrimination and injustice... In addition, Morehouse instills in students a commitment to service. Morehouse also emphasizes the continuing search for truth as a liberating force and subscribes to the philosophy that in order to be educated, men must learn about themselves and about their world in all its varied aspects.”

## **International Power Institute**

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In 1997, Morehouse College established the International Power Institute (IPI) as a part of the newly established Andrew Young Center for International Affairs. The Department of Energy has assisted IPI by providing a grant to help it carry out its goals of: 1) facilitating electric power and related infrastructure transaction between developing countries and the U.S. power sector; 2) collaborating with developing countries to identify development strategies to achieve energy stability and enhance economic development; and 3) encouraging market driven energy solutions and 4) working collaboratively with other international trade, energy, technology and banking organizations. IPI has concentrated its initial efforts in the South African and Mexican power sectors. As a part of this initial effort, IPI undertook an exploratory visit to South Africa in March 1998 to gain a better understanding of the current economic and political involvement in South Africa, obtain a picture of the energy situation and to evaluate potential opportunities or future IPI projects.

## **ESKOM Request to Train Labor Leaders**

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As a result of the exploratory visit, ESKOM expressed an interest in getting IPI's assistance in helping to train its labor leaders. In June 1998, ESKOM followed up this initial contact with a letter requesting IPI to develop a proposal to provide a proposal for both short term (3 to 4 weeks) and long term training (2-3 months) in the areas of economics, democratic unionism and leadership. This proposal is in response to this request.

## **Proposed Training Program Objectives and Process**

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The training program is tailored to meet ESKOM's needs and designed specifically to enable ESKOM management and its unionized workforce to:

- a) accurately understand and analyze the nature of their past and current working relationship, as well as envisioned changes regarding the way work is organized and structured;
- b) provide the knowledge and skills to be able to work and negotiate in a structured manner to reach agreements to improve their "respective" labor relations.

In order to provide this training Morehouse College's IPI has elected the support of its Brisbane Institute to engage faculty and other experts in labor education, labor leadership skills development and organizing skills to help to conduct the training programs. The training programs will utilize the following processes:

- a) **Participatory Assessment:** This approach places a premium on the initial validation of the experiences and values of the participants, in addition to honest feedback on their expectations and solicitation of their reasons for involvement. Reaching out with integrity and respect and earning trust are important to the process.
- b) **"Do-It-Yourself" (DIY) Preparation and Planning:** This aspect of the program encourages, whenever possible, participants doing research, leading discussions, role-playing

demonstrations and problems solving for themselves. DIY is vital for participants becoming competent and confident enough to look and progress beyond their current roles.

- c) **Structured Leadership Challenges through All Stages:** The orientation here is to challenge all participants, as leaders, to take ownership of the training effectiveness and outcomes. This requires their active role in shaping the training programs' issues and questions, as well as the development of the curriculum, materials, and methods. This variant and orientation goes beyond the typical "train-the-trainer" methodology.
- d) **"Understand If Not Walk In the Other Parties Shoes":** Participants are invited to come to grips with the content and culture of the views of "the other side." This will lend to an assessment for both sides, of the operational and functional environment of the other party or parties with whom they are obliged to work, live and negotiate. The goal is the creation of an environment and process of basic, honest exchange.
- e) **Methodology:** Our training orientation is guided by and rooted in the belief that "*showing is better than telling, and doing is better than showing.*" Sessions will include guest speakers, trainee projects, library research and field trips.

SI TRAINING  
PROGRAM

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# **Short Term Training Program for ESKOM Union Leaders**

## Four Week Training Module

I.P.I.'s Labor Relation's Team has put together a Four (4) Week Training Module, broken down into four, one week segments. The subject content has been developed by the team based upon the request from ESKOM and the expertise of the Core Team members and their advisors and consultants.

The training process is designed to:

1. Determine and identify the most pressing problems facing ESKOM Union Leadership in their relationship with management;
2. Instill in the union leadership a heightened sense of purpose and willingness to take ownership of a process that will increase effective outcomes of meaningful, good faith bargaining;
3. Develop skills and experience leading to improved union administration;
4. Enhance realistic expectations and improve process knowledge to facilitate future labor regulations and grievance procedures;
5. Provide participants with enhanced skills and knowledge to develop and/or strengthen a functioning democratic work culture and structure internal to the union.

The time and specific location for this training in South Africa is to be determined by mutual agreement between ESKOM and IPI.

### **Subject Material for Morehouse/IPI Training Course for ESKOM**

- **US/South Africa Labor Relations Trends**
- **Union/Trainee/ESKOM Expectations**
- **Labor Needs & Issues at ESKOM**
- **Economics**
  - Basic Principles
  - Macro Theory
  - Micro Theory
- **Energy**
  - Introduction to Basic Principles
  - Utility Operations
  - Competition & Globalization
  - Restructuring & Privatization

- **Labor Relations**

- Current & Developing Labor Theories
- Work Force Diversity
- Comparative Study
- High Performance Work Forces
- Mutual Gains Bargaining
- Critical Issues

- **Union**

- Union Democracy
- Workplace Education
- Literacy Issues & Skill Enhancement
- Worker Displacement & Manpower Management
- Process of Change in the Workplace
- Comparative Study
- Defining Leadership
- Leadership Development
- Women in Unions & as Leaders
- Site Visits

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## **Deliverables**

**Curriculum Development**—IPI's staff will be responsible for developing the curriculum for the ESKOM Union Leadership Training Program. The subject matters for the four-week training module are as follows: Economics, Democratic Unionism, Leadership Development/Training, Labor Relations, Electric Utility Operations, Energy Basics, Competition/Globalization, Privatization, Workforce Diversity Training, Workplace Education, Collective Bargaining. (See current module outline for details.)

**Training Manuals**—IPI's staff will be responsible for producing training manuals for all participants. The training manuals will be divided by subject matter. Each subject matter section will contain the following materials:

worksheets	daily work	small group projects	demonstrations
special projects	homework	glossaries	library references
graphs	charts	quizzes	

**Instructors' Manuals**—IPI staff will be responsible for producing instructor's training manuals. Each subject matter section will contain the following materials.

daily work	workbooks	instructor observations
test/quizzes	reassessment test	practice sheets
pupil progression indicator	special projects	workbook checkers

**Computer Self-test**—IPI will be responsible for designing a computer self-test for the Union Leadership Training Program.

**Evaluation Devices**—IPI staff will be responsible for developing evaluation tools for the ESKOM Union Leader Training Program according to subject matter. The evaluation tools consist of:

daily work	homework assignments	test/quizzes
reassessment tests		

**Materials Production**—IPI will be responsible for producing all materials related to the ESKOM Union Leader Training Program.

## **Training Program Schedule**

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The Short Term Program for ESKOM Labor Leaders is broken down into four, one-week modules for the union leaders.

All training will encourage "Do-It-Yourself" (DIY) format with participants doing research, leading discussions, role-playing and problem solving. Course training will also involve case studies, practicals, self-study, and some homework and a few specified lectures.

## **Week One: "Participatory Assessment"**

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### **Day 1 (Monday)\* Introductory Session**

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08:00 — 08:30	Breakfast
08:30 – 10:15	Introductions; Discussion: Why are they here? — Why are we meeting?; Their understanding of the meeting process and purpose of training
10:15 – 10:30	Break
10:30 – 12:00	How they see benefiting from the training program. Role they see for themselves. Role they expect of us
12:00 – 1:00	Lunch
1:00 – 3:00	Brief summary presentations of topics and issues in course training, including U.S. labor relations
3:00 – 3:15	Break
3:15 – 4:45	Solicit feedback, clarification questions on course topics; Critiques, any suggestions regarding how to make issues more relevant, any suggested additions, ordering of priorities
4:45 – 5:00	Homework assigned
5:00 – 6:30	Free / Personal Time
6:30 – 7:30	Dinner*

\* Note: Each evening there will be a hospitality room established for students to interact and exchange ideas on what they have learned. Faculty will be available to answer questions or interact with trainees.

### **Day 2 (Tuesday) Brief Overview of Current US Labor Relations & Comparison to South African Labor Relations**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework Assignment
10:15 – 10:30	Break
10:30 – 12:00	Overview of U.S. Labor Relations
12:00 – 1:00	Lunch

1:00 – 3:00	South African Labor Relations: Solicit assessment of co-workers, demographic issues, factors which contribute to harmony, disharmony, and tensions
3:00 – 3:15	Break
3:15 – 4:45	Assessment of the union: expectations, vision, reality, strengths, weaknesses, clarification of roles in general and at ESKOM
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 3 (Wednesday) Assessment of ESKOM**

0:800 – 08:30	Breakfast
08:30 – 10:15	Review Homework Assignment
10:00 – 10:15	Break
10:15 – 10:30	Assessment of ESKOM as an Employer
12:00 – 1:00	Lunch
1:00 – 3:00	Assessment of ESKOM's Economic and Social Development Responsibilities
3:00 – 3:15	Break
3:15 – 4:45	Assessment of South Africa's government, principal political forces, S.A.'s role in the region, internationally; their role as citizens, taxpayers, consumers, etc.
4:45 – 5:00	Homework Assignment
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 4 (Thursday) Issues of Labor Relations and Law**

08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Issues of Labor Relations: Comparison US/SA

12:00 – 1:00	Lunch
1:00 – 3:00	Issues of Labor Law: Comparison US/SA
3:00 – 3:15	Break
3:15 – 4:45	Discussion of Effect of Labor Relations, Traditions and Labor Law on ESKOM
4:45 – 5:00	Homework assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

## **Day 5 (Friday) Developing Labor RelationsTheories**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework Assignment
10:15 – 10:30	Break
10:30 – 12:00	Current and Developing Labor Relations: distinctions between Taylorism (scientific management), lean production and high performance work organization; What constitutes “traditional” adversarial trade unionism and adversarial labor relations in the U.S.
12:00 – 1:00	Lunch
1:00 – 3:00	Evolution of Human Resource Management Current Trends in the Organized Labor Movement, including: Employee Involvement, Quality of Work Life, Total Quality Management, New Work Systems, Mutual Gains as a process, Socio-Tech Reengineering, Virtual Organization.
3:00 – 3:15	Break
3:15 – 4:45	Sum-up Main Lessons Learned for the Week
4:45 – 5:00	Homework Assigned
5:00 –	Free for Weekend

Note: This detailed focus on participants sharing views on the range of issues and various relations is key for the Core Team to shape the training program to address their needs. Also intended is the establishment of trust and mutual understanding, if not agreement of how best to work together and maintain integrity to the process. In addition, for the first week, assessment and acknowledgement of South Africa's situation, including the status of all parties involved, can identify “workplace improvement opportunities, growth and development” for union leaders and for ESKOM.

## **Week Two: "Economics"**

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### **Day 1 ( Monday): Economic Overview**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Introduction to Economic Overview/"Common Sense Economics", AFL-CIO Education Program
12:00 – 1:00	Lunch
1:00 — 3:00	Basic Macro Economics: GNP, Saving and Investing, Passive Consumption, Active Investment, Budgets and Fiscal Policy, What Money Is, How It Works, Inflation, Productivity
3:00 – 3:15	Break
3:15 – 4:45	Basic Micro Economics: Supply and demand, prices, strengths and weakness of markets
4:45– 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

Note: The team will make use of relevant practical exercises, case-studies, visual aides with charts, graphs, overhead) and role plays to effectively present subject material, in keeping with DIY pedagogy.

### **Day 2 (Tuesday): Energy Basics/Electric Utility Operation**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Energy Basic Principles: Energy Markets, Competition Among Energy Sources, End-use Markets, Efficiency and Conservation, Energy Driver of Economy.
12:00 – 1:00	Lunch

1:00 — 3:00	Electric Utility Operation: Generation/Transmission/ Distribution, Finance, Role of customers, Development of Non-utility Sources, and Competition.
3:00 – 3:15	Break
3:15 – 4:45	Comparative Case Studies
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 3 (Wednesday): Competition and Globalization**

08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework Assigned
10:15 – 10:30	Break
10:30 – 12:00	Defining Competition: Challenges to Domestic Economic Development, Case Study
12:00 – 1:00	Lunch
1:00 — 3:00	Defining Globalization: Practical exercises, Topical Issues, Local Ramifications; Case Study, Group Breakout
3:00 – 3:15	Break
3:15 – 4:45	Discussion of Case Findings: Challenges to South Africa, South African Workers, ESKOM
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 4 (Thursday): Restructuring and Privatization**

08:00 – 08:30	Breakfast
08:30 – 10:15	Homework Review
10:15 – 10:30	Break

10:30 – 12:00	Definition of Restructuring: Trends in industrial organizations, Mergers, Out sourcing, Vertical/horizontal integration/dis-integration, Public Sector/context for Privatization
12:00 – 1:00	Lunch
1:00 — 3:00	Privatization Trends: Historical trends in all industries, Comparative developments in utility industry, Challenges, Problems, Case-studies
3:00 – 3:15	Break
3:15 – 4:45	Implications for South Africa, ESKOM, Union Leaders, Workforce.
4:45 – 5:30	Homework Assigned: Preparation for Joint Meeting
5:30 – 6:30	Personal Time
6:30 – 7:30	*Dinner (access to hospitality room after)

#### **Day 4 (Thursday) Management Orientation (Management Only)**

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1:30 – 2:15	Purpose of Training Program for ESKOM Union Leaders
2:15 – 3:00	Material Covered in Program
3:00 – 3:15	Break
3:15 – 4:00	Material to be Covered in Program
4:00 – 5:00	Management Perception of Needs & Issues
5:00 – 5:30	Homework Assigned
5:30 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

\*Join Union Leader Trainees for Dinner

#### **Day 5 (Friday): Management Preparation for Joint Session (Management Only)**

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08:00 – 08:30	*Breakfast
08:30 – 9:30	Review Homework Assignment & Preparation for Joint Session

09:30 & Beyond \*(See joint schedule)

(Note: Astrick (\*) on topic denotes joint session

## **Day 5 (Friday) Joint Assessment Union/Management of Needs & Issues**

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08:00 – 08:30	Breakfast
08:30 – 9:30	Review Homework Assignment
9:30 – 10:15	*Introduction of ESKOM Union/Management
10:15 – 10:30	*Break
10:30 – 12:00	*Joint Review of Expectations
12:00 – 1:00	*Lunch
1:00 – 3:00	*ESKOM Issues and Needs
3:00 – 3:15	*Break
3:15 – 4:45	*ESKOM Issues and Needs Continued (wrap up)
4:45 – 5:00	Homework Assignment
5:00 –	Free for Weekend

\*Management participants will attend this session

## **Week Three: Democratic Unionism and Workplace Diversification**

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### **Day 1 (Monday): Democracy Unionism**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Homework Reviewed
10:15 – 10:30	Break
10:30 – 12:00	Union Democracy: Social implications, Responsibilities, Impacts on operations
12:00 – 1:00	Lunch
1:00 — 3:00	Challenges of Diversification: Workplace social regional/provincial, national implications
3:00 – 3:15	Break
3:15 – 4:45	Challenges of Diversification Continued
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 2 (Tuesday): Union Approach to Workplace Education and Training**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Homework Review
10:15 – 10:30	Break
10:30 – 12:00	Union Approach to Workplace Education and Training
12:00 – 01:00	Lunch
01:00 – 05:00	Site Visit: Discussion with Management/Union of South African firm
5:00 – 5:15	Homework Assigned: Assess Site Visit Lessons
4:45 – 5:00	Homework Assigned
5:15 – 6:30	Personal Time

## **Day 3 (Wednesday): Comparative International Study of Labor Relations**

08:00 – 0830	Breakfast
08:30 – 10:45	Review Homework: Site Visit Assessments
10:15 – 10:30	Break
10:30 – 12:00	Overview Labor Relations in Various Countries and Industries
12:00 – 01:00	Lunch
1:00 – 3:00	Comparative Study: Case Studies
3:00 – 3:15	Break
3:15 – 4:45	Comparative Study Wrap-up
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

## **Day 4 (Thursday): Case Studies on High Performance Work Organization and Human Resource Management (Mutual Gains)**

08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	High Performance Work Organizations: Examination of Nummi, Saturn, CAMI, Shell-Sarnia, European examples
12:00 – 1:00	Lunch
1:00 – 3:00	Case Study Findings Examined Through Break Out Groups
3:00 – 3:15	Break
3:15 – 4:45	Break Out Groups Continued
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

## **Day 5 (Friday): Shared Experiences with different approaches to Collective Bargaining—Organizing Models, Continuous Bargaining, Mutual Gains**

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08:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Overview of Collective Bargaining/New Approaches
12:00 – 1:00	Lunch
1:00 – 3:00	Comparative Collective Bargaining wrap up
3:00 – 3:15	Break
3:15 – 4:45	Summary of main lessons learned during week
4:45 – 5:00	Homework assigned
5:00 –	Free for Weekend

## **Week Four “Leadership”**

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### **Day 1 (Monday): Defining Leadership and Women As Union Leaders**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Defining Leadership: Criteria and Character
12:00 – 1:00	Lunch
1:00 — 3:00	Strengths and Weaknesses of Current Union Leadership
3:00 – 3:15	Break
3:15 – 4:45	Assess Status of Women in Union: Assess necessary steps to develop women leaders
4:45 – 5:00	Homework Assigned
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

### **Day 2 (Tuesday): Identification of Critical Labor Relations Issues With ESKOM**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework
10:15 – 10:30	Break
10:30 – 12:00	Identification of Issues Regarding Labor Relations with ESKOM
12:00 – 1:00	Lunch
1:00 — 5:00	Site Visit: Discussion with Management/union of South African Firm
5:00 – 5:15	Homework Assigned: Assess site visit lessons
5:15 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

## **Day 3 (Wednesday): Plans for Change and Process of Leadership Development**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Homework Reviewed: Site Visit Assessments
10:15 – 10:30	Break
10:30 – 12:00	Process for Change: Discussion on Strategic Thinking
12:00 – 1:00	Lunch
1:00 — 3:00	Process for Change: Developing Vision
3:00 – 3:15	Break
3:15 – 4:45	Formulation of Issues as Proposals for Negotiations
4:45—5:00	Homework assigned: Subjects to be decided by group
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner (access to hospitality room after)

## **Day 4 (Thursday): Effective Ways To Present Issues/Context for Negotiations/Discussions with ESKOM Management**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Participants will evaluate their peers presentations, conclusions, plans for next steps, examine if results met collective expectations from the previous day
10:15 – 10:30	Break
10:30 – 12:00	Workshops, Breakout Groups, Role Plays and Simulations
12:00 – 1:00	Lunch
1:00 — 3:00	Case Studies, Review of Findings
3:00 – 3:15	Break
3:15 – 5:00	Prepare for Sharing of Views with ESKOM Management
5:00 – 6:30	Personal Time
6:30 – 7:30	*Dinner (access to hospitality room after)

## **Day 4 (Thursday): Management Preparation for Joint Session (Management Only)**

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1:30 – 3:00	Review of Union Leaders Training Process
3:00 – 3:15	Break
3:00 – 5:00	Preparation for Joint Session: Expectations, Appropriate/ Inappropriate Responses, Special issues
5:00 – 6:30	Personal Time
6:30 –	*Join Union Leader Trainees for Dinner

## **Day 5 ( Friday): Review of Major Lessons Learned from the Four Week Training/Evaluation/Graduation Certificates**

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8:00 – 08:30	*Breakfast
08:30 – 10:15	*Major Lessons Learned from Four Week Training: Presentation by Trainees, Discussion Managed by IPI Staff
10:15 – 10:30	*Break
10:30 – 12:00	*Major Lessons Continued
12:00 – 1:00	*Lunch
1:00 – 2:30	*Evaluation of Training
2:30 – 3:30	*Graduation Ceremony: Presentation of Certificates
3:30 –	*End of Training Session

## **Labor Relations Team for Short Term Program**

IPI has obtained a dynamic, experienced and professional team of respected educators and practitioners in the fields of New Work Systems (NWS), trade unionism, global economic trends, public utility industrial developments, labor studies education and training, leadership development, and union democracy available in the United States.

The core team will include four persons who will conduct the daily training and five instructors/consultants. The team also contains three resource people who will not participate in the daily training nor be "on-site" but who have helped with the development of the proposed program. (See Exhibit B) In addition, Morehouse College faculty and students will serve as resource people.

### **The Labor Relations Team**

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#### **Core Team:**

##### **Dennis Orton: (Team Leader) (Morehouse)**

Dennis Orton has earned a reputation as a nationally respected labor leader, educator and organizer, during the course of his 25 years serving in various capacities of leadership in seven (7) different international unions in the private and public sector. Mr. Orton has served as a twice-elected union vice-president, lead negotiator on national industry-wide contracts as well as regional sector and local supplementary agreements, coordinator of education and training programs, grievance and arbitration chairperson, and chair of executive boards, stewards councils and constitution and by-law committees.

Representing labor unions, Mr. Orton has also served as an official liaison with the African-American community, national civil rights organizations, the media and government labor market and regulatory agencies.

Mr. Orton possesses strong expertise in institutional needs assessment, strategic planning and implementation, and individual and group leadership skills training and development. He has gained broad recognition for his singular ability to effectively coordinate union and worker responses to workplace change and labor-management participation programs.

In his capacity as Vice-President of the American Federation of Grain Millers (AFGM), Mr. Orton developed a comprehensive education program for the union membership and was the major force developing and coordinating the strategic programmatic response of the workforce to the *New Work Systems (NWS)*.

Mr. Orton has been sought by leadership of unions and officials of the Department of Labor and Education to review and critique "cutting edge" theories, strategies, and programs regarding the

transformation of U.S. and world industrial relations and the field of Human Resource Management.

Mr. Orton has earned the respect of his peers as an important labor educator and organizer regarding job redesign, work-site re-engineering, the culture of workplace change, and the changes affecting traditional collective bargaining and contract administration.

In addition to his experience in labor, Mr. Orton has served as a mayoral aide, taught mathematics, and acted as a youth and gang counselor. In those capacities, he helped to establish successful inner-city drug prevention and school retention programs.

Mr. Orton graduated cum laude from the Choate School in Wallingford, Connecticut and studied for two years at Columbia University in New York City after transferring from Harvard University in Cambridge, Massachusetts.

**Lee Schore:**  
**(Center for Working Life)**

Lee Schore is the director of the *Center for Working Life (CWL)* in Portland, Oregon and Adjunct Faculty at the University of Oregon Labor Education and Research Center. She is one of the United States leading labor educators and strategists dealing with the subject of workplace restructuring. Among her many consulting assignments she worked for large private sector corporations such as the Kellogg Company, for local and state governments in California and Oregon, and the U.S. Department of Labor.

CWL is a non-profit organization that provides innovative education, training and consultation services focusing on the mental health effects of work, and the loss of work, on individuals and families.

Ms. Schore has done extensive consultation and training on the effect of change in the workplace and the process of re-engineering in Joint Labor-Management settings. She has been an invited presenter at national and international conferences on workplace education, the changing nature of work, and design and implementation of dislocated worker and workplace education services.

Ms. Schore has worked in the international arena as a technical assistance expert for the U.S. Department of Labor, and is the author of several respected publications dealing with the field of workplace education training for dislocated workers and support services and stress counseling for workforces.

Lee Schore has a Masters Degree in Psychiatric Social Work from UCLA. Her B.A. is from Penn State University.

**Ashaki M. Binta:**  
**(Morehouse)**

Ashaki M. Binta is one of the most innovative and respected practitioners in the field of leadership training and skills development for workers and communities. She has more than 20 years experience in organizing labor, community, electoral, and women's groups. The cutting edge workshops and programs she develops, with particular emphasis on the needs of and challenges to working class and disadvantaged poor populations, including women, are always grounded in promoting the values of social justice and progress.

Ms. Binta has served as a Senior Field Representative for various locals of the Service Employees International Union (SEIU). She has held responsibilities for coordinating shop steward and leadership development training as well as contract enforcement, grievance and arbitration handling, membership development, organizing and campaign development, and contract and plant closing negotiations.

Ms. Binta also has particular expertise in working with non-unionized workforces outside of traditional national, regional, and local labor formations including developing organizing campaigns, issue campaigns, workplace committees and membership organizations. Her work has continually focused on leadership and membership recruitment and development. She is also experienced in establishing worker's councils and industrially focused, geographically based networks, organizations, and structures among non-unionized workforces.

Ms. Binta has traveled in Africa and many other parts of the world. An inspirational speaker, Ms Binta is a much sought after presenter at conferences and forums here in the U.S. and in the international arena. She is an authority on competition and globalization issues as they affect the southeastern United States.

Strongly results oriented, in 1983 – 84, Ms. Binta was one of the lead organizers of the victorious peoples campaign to elect Harold Washington Mayor of Chicago. In 1985, she became an Associate Editor of the renowned *Southern Exposure Magazine*. From 1986–1989, she was the lead organizer for the triumphant people's justice movement to reactivate the small, majority black town of Keysville, Georgia and to elect Emma Gresham Mayor. In 1991 – 92, Ms. Binta led a successful justice movement in Hamlet, North Carolina after 25 workers (18 women) were killed in the infamous fire and explosion at Imperial Foods Chicken processing plant. She has a Bachelor of Arts Degree from Valparaiso University in Valparaiso, Indiana.

**Peter Donahue:**  
**(PBI, Associates)**

Peter Donahue, Ph.D. Economics is President of *PBI, Associates* in Portland, Oregon. He is one of the U.S. most sought after consulting economists, particularly in the field of energy and utilities in the United States.

Founded in 1982, *PBI* has earned an excellent reputation aiding unions, communities, and governments in research, bargaining, arbitration, organizing, training, and government relations.

Dr. Donahue has established a long-standing and well respected relationship with the largest U.S. union representing utility industries workers, the International Brotherhood of Electrical Workers (IBEW), AFL-CIO. Specifically, he has assisted IBEW Locals 1245, 6, 125, and 48 on utility deregulation and related issues in administration, legislative, bargaining and arbitration proceedings regarding utility deregulation.

Dr. Donahue studied for his Ph.D. in economics at the University of Texas at Austin under former Secretary of Labor, Ray Marshall. Professor Marshall, the present "Andre and Bernard Rapoport Centennial Chair in Economics and Public Affairs" at the LBJ School of Public Affairs, author of the seminal work "Unheard Voices, Labor and Economic Policy in a Competitive World", and one of the worlds most renowned authorities on High Performance Work Organizations, remains one of Dr. Donahue's strongest supporters and advisors.

Dr. Donahue received his Masters Degree in Labor Studies from the University of Massachusetts-Amherst and his B.A. in Economics from Columbia University in New York.

### **Instructors/Consultants:**

As the essential support and resource base for the four Core Team members, I.P.I has assembled five qualified individuals to serve as instructors/consultants. The instructors/consultants consist of three educators, one IBEW union leader and one retired utility executive with a labor relations background. Working closely with the Core Team, they will assist with preparation by identifying case studies, practical experience and primary materials to research. Additionally, the instructors/consultants will help to coordinate work-site visits as well as take the lead in presenting specified areas of education and training for workers.

#### **Hasan Crockett:** **(Morehouse)**

Hasan Crockett, Ph.D., is an Assistant Professor of Political Science at Morehouse College. He teaches American National Government, State and Local Politics, and Public Administration. His research area is U.S. Labor History and the southern African American community. Dr. Crockett's present research is in the area of coalition relations between southern civil rights organizations and organized labor. He is examining contributing factors which impact the social role and performance of unions in relationship to the African American society. The degree to which these same factors have tended to reinforce manifestations of democratic practices, culture, and functions internal to the organizations themselves regarding structure, governance, and administration.

Dr. Crockett has made important contributions in helping labor unions propagate values of equality of treatment and representation of workers of different population groups regarding nationality, ethnicity, culture, language and religion. Reflecting appreciation of his work and reputation, he is widely respected in the ranks of organized labor and prominent labor studies departments.

The AFL-CIO Organizing Institute and major national unions constantly seek out his students for support and technical assistance in their work and campaigns. In addition, Dr. Crockett is a much sought after presenter and trainer by Labor Studies Centers, particularly in the Southeastern region. Most recently, Dr. Crockett was an invited fellow and trainer for Mississippi high school teachers at the Jackson State University Center for Labor Studies and Research in Jackson, Mississippi.

#### **Steven Deutsch:** **(University of Oregon)**

Steven Deutsch, Ph.D., has spent the last three decades as a visitor and member of faculties of several American and international universities, with strong emphasis on applied and policy-relevant areas. At the University of Oregon, Dr. Deutsch has been Professor of Sociology; Director of the *Center for the Study of Work Economy and Community*; Professor in Industrial Relations Graduate Program; and Professor in the Labor Education and Research Center.

His primary research activities have focused on labor-management relations, worker participation and work restructuring; technological change at work; work environment, occupational health and safety issues; labor market, workforce skills development, and economic policy issues. He has researched in public and private sectors and many industries including auto and aerospace, health care, telecommunications, and government.

Dr. Deutsch has been invited to give expert testimony before the U.S. Congress and the Oregon State Legislature. He has advised the Oregon Economic Development Department and Senate Labor Committee and helped in preparing legislation.

He has been asked to give presentations to professional staffs in the U.S. Congress Office of Technology Assessment, Health Care Financing Agency, National Institute for Occupational Safety and Health.

As a consultant and panelist for many U.S. governmental agencies he has participated in panels for the U. S. Congress Office of Technology Assessment, U.S. Department of Labor, National Institute for Occupational Safety and Health, U.S. Government Accounting Office, National Institute of Mental Health, National Institute for Environmental Health Sciences.

Dr. Deutsch has been a Senior Fulbright Scholar in Yugoslavia and Australia and visitor to universities in Sweden, Norway, England, Italy, New Zealand, Australia, and Canada. He has also been a guest of the Japan Institute of Labor.

International work has included consulting for international advisory boards for many institutions including: Swedish Ministry of Labor, Swedish Center for Working Life, Norwegian Work Life Center, Norwegian Work Research Institute, Norwegian Ministry of Health and Social Affairs, Australian Commonwealth Department of Industrial Relations, New Zealand Department of Labor, and international research bodies such as Canada Council and New Zealand Foundation for Science and Technology. Also, he is on the international editorial advisory board for Economic and Industrial Democracy Stockholm.

Dr. Deutsch has served on many advisory boards for unions, research institutions, research projects and programs in occupational health, workplace and technological change, and economic policy issues. In 1997-98 he advised the new AFL-CIO Center for Workplace Democracy. Other roles include the boards of Johns Hopkins University VDT Health Research Center, Work and Technology Institute, American Hospital Association Advisory Committee on Occupational Health and Safety, UAW/General Motors Human Resource Development Institute, and the American Friends Service Committee, consultant and lecturer at the Machinists Union Technology Center and the George Meany Center for Labor Studies.

He has published widely on many aspects of work and the economy and spoken to large numbers of universities and research institutes, unions, governmental agencies, public forums, management associations, and media sources.

**Thandabantu Iverson:  
(Indiana University Northwest)**

Marion Thandabantu Iverson, Doctoral candidate, Political Science Department, Clark Atlanta University and Visiting Assistant Professor, Division of Labor Studies at Indiana University Northwest is a leading authority on the role of unions and effective Gender and Racial Diversity

**Education and Training.** These issues are particularly acute in industrial settings where significant diversification in the workforce is occurring in the context of deregulation, restructuring, and downsizing.

Professor Iverson has received praise for his work with employed and displaced steelworkers in Indiana by the Steelworkers union and the labor studies academic community.

Currently, Professor Iverson has focused on collaborative projects by the utilities industry, local government, the Indiana State AFL-CIO and the labor studies program to do "Train-the-Trainer" leadership development for union leaders in the deregulated utilities industry.

Professor Iverson has experience teaching other labor studies subjects regarding collective bargaining, labor history, contemporary union organizing, union democracy in a globalized economy, third world social movements, and trade unions in the underdeveloped world. In addition, he teaches courses in women's studies, comparative politics, African politics, and political theory.

**Rene H. Males**  
**(Strategic Decision, Inc., IPI Board Member)**

Rene Males is President of Strategic Decisions, Inc., a firm specializing in strategic planning in the energy industries. This re-initiates the practice he had as a Principal in Decision Focus, Inc., a Los Altos, California consulting firm basing its practice on decision analysis techniques applied to energy, environmental and general business issues.

Mr. Males recently retired from IES Utilities where he had been President and Group Executive. IES is the electric and gas utility formed by the merger of Iowa Electric and Iowa Southern Utilities, where Males was President and CEO. Males has held executive positions with Wisconsin Electric and Commonwealth Edison. He was President of Joy Environmental Technologies, a firm producing and installing air quality control equipment and ash handling equipment. In addition, he was Vice President and Director of the Energy Analysis and Environmental Division of the Electric Power Research Institute, the research arm of the electric utility industry.

Mr. Males began his career in the utility industry at Commonwealth Edison where he was a member of the management negotiating team during two major full contract reopenerns. Also, he headed the negotiating team to determine equitable settlements when the company designed an on-line computer system for customer records and other service functions. During his executive career he participated in the management council determining negotiating positions at Commonwealth Edison, Wisconsin Electric, Iowa Southern and IES Utilities. Mr. Males served as the next to last step or last step negotiator in the grievance procedures at these three utilities. During his tenure at EPRI, Mr. Males was called on to participate in the training and development of senior union officials in the IBEW as well as two other unions.

He has an MBA from Northwestern University, where his field of concentration was labor economics. He lectured in their graduate business program as well as that of DePaul University. His undergraduate degree is from Ripon College in Wisconsin.

Mr. Males has been active in advisory roles to a number of organizations. Currently, he is a member of the National Coal Council, the advisory organization to the Department of Energy, and

is the NCC's policy committee Vice-Chairman. He has served on advisory committees to Brookhaven and Oak Ridge National Labs, to the Office of Technology Assessment, to the Department of Commerce and to a number of other agencies.

He has published articles on energy and environmental issues in a number of journals, contributed chapters to several books and has spoken frequently on these subjects.

**Landis Martilla:**  
**(IBEW)**

Landis Martilla is a Business representative and lead organizer for Local 1245, of the International Brotherhood of Electrical Workers (IBEW). From his rank and file beginning as a member of the IBEW, Mr. Martilla experienced a steady rise through the union ranks due to his strong and consistent demonstration of principled leadership. He is widely respected now by both management and union people.

In addition to his other duties, he has assumed principal responsibility for coordinating the local's important health and safety portfolio. Health and safety has emerged as one of the most important issues of workers and their unions in the utility industry, particularly during this period of utility deregulation and down sizing.

In 1991, the Local 1245 leadership and PG & E were negotiating an agreement to jointly structure a labor-management participation program. Mr. Martilla served as one of the spokespersons for the rank and file who were concerned about protecting their interests during the negotiations process.

In 1955, the San Mateo County Labor Council (one of the strongest labor union bodies in the U.S.) chose Mr. Martilla as *unionist-of the year* for his exemplary practice of trade union solidarity. He has a Bachelor of Arts Degree in Psychology with a concentration in Labor Studies, from San Francisco State University.

**Resource People:**

**Robert Baugh:**  
**(AFL-CIO)**

Robert Baugh is Assistant Director, AFL-CIO, Human Resources Development Institute of the AFL-CIO. Mr. Baugh has written for important labor publications including Labor Research Review. He has also authored publications addressing workforce development strategies and the role of high performance work organizations.

Recently, Mr. Baugh served as one of the two lead investigators and writers for the AFL-CIO publication, *"Economic Development, A Union Guide to the High Road"*. The publication of *"Economic Development...."* Represented a collaborative effort between the AFL-CIO, the Human Resources Development Institute, and AFL's Corporate Affairs, Education, Field Mobilization, Public Policy, and Public Employees Departments.

Previously, Mr. Baugh served as Secretary-Treasurer of the Oregon AFL-CIO and as Partnership Division/Workforce Development Manager for the Oregon Economic Development Department.

**Dan Holub:**  
**(IBEW)**

Dan Holub is the Business Manager for IBEW Local 204 in Cedar Rapids, Iowa. The International Brotherhood of Electrical Workers (IBEW), is the largest AFL-CIO affiliated labor union in the U.S. representing workers in the utility industry, particularly the electrical utility sector. IBEW, Local 204 represents workers with IES utility workers in Iowa.

Mr. Holub is widely respected as one of the most progressive labor leaders in the IBEW nationally and he serves on the national unions' National Committee on Utility Deregulation.

He has strong expertise regarding comparative approaches to Labor Relations and Collective Bargaining with particular emphasis on the utility industry.

**Roberta Till-Retz:**  
**(University of Iowa)**

Professor Till-Retz is Program Consultant at the University of Iowa Labor Center, Iowa City, Iowa. She is one of the country's leading experts in the field of labor relations and collective bargaining. As a leader in the national University and College Labor Education Association, Professor Till-Retz is the current Managing Editor of the pre-eminent scholarly "refereed" labor publication in the U.S., the *Labor Studies Journal*.

She has written influential studies regarding the evolution of Labor Negotiations and Collective Bargaining as a process in the context of *New Work Systems*.

Recently, Professor Till-Retz returned from South Africa, on a study tour of the Kimberly Region of Northern Cape Province. There she served as the chief investigator on a study tour of Labor Relations in the Education Sector of the Kimberly Mining area.

The tour was undertaken at the invitation of Dr. Zodwa Dlamini, the Deputy Director General of Education in the Northern Cape, facilitated by Aurora Associates, Inc., and funded by USAID. It was designed to take advantage of Prof. Till-Retz's expertise in Labor Relations in order to strengthen the current transitional phase of Education Sector Labor Relations in the Northern Cape Province.

**Morehouse College/IPI**

Morehouse College faculty and students will also serve as resource people during the proposed training program.

**EXHIBIT B**  
**Short Term Training**  
**Labor Relations Team Responsibilities**

MEMBERS	COURSE DEVELOPMENT	TRAINING			
		Week 1	Week 2	Week 3	Week 4
<b>CORE TEAM</b>					
Dennis Orton (leader)	X	X	X	X	X
Ashaki Binta	X	X	X	X	X
Peter Donohue	X	X	X	X	X
Lee Schore	X	X	X	X	X
<b>INSTRUCTORS/CONSULTANTS</b>					
Hasan Crockett	X				
Steven Deutsch	X		X		
Thadabantu Iverson	X			X	
Rene Males	X	*	X	*	*
Landis Mantilla	X		X		
<b>RESOURCES</b>					
Robert Baugh	X				
Dan Holub	X				
Roberta Till-Retz	X				

\* Available in SA for consulting with Team on ESKOM management.

*Budget removed*



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# **Long Term Training Program for ESKOM Union Leaders**

## Three Month Training Module

### Long Term Training Program

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The long term training program for ESKOM will be constructed in three separate one month modules (more detailed break-downs will be drawn out after summing up the results of the four week short term school.)

The key components of each of the one month trainings will be structured class room work combined with site visits to identified labor studies centers as well as work-site visits to electric utility workplaces represented by the International Brotherhood of Electrical Workers Union (IBEW). Other resources will be sought when such needs are identified.

The Long Term Training Program will involve simulation, role-play, and homework in keeping with our established emphasis on "Do-it-Yourself" learning. Study will also take the form of interactive workshops, case-studies, and practical exercises. Classroom teaching will again be led by the Core Team, Core Team Advisors/Instructors, and qualified faculty from Morehouse College and the University of Oregon. There will also be presenters from the U.S. Department of Labor, Morehouse College Faculty and the Cornell School of Industrial Relations. Worksite visits will feature union leaders and management people conducting interviews and participating in Round-table discussions.

### Month One: Main Theme – Democratic Unionism

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- South Africa — Classroom work will be at ESKOM's Training Center in South Africa

#### Week One: Collective Bargaining Training Seminar

- Simulations, Evaluations, and Case Studies
- Comparative analysis of Relevant Labor Law, S.A. and U.S.
- Comparative Assessment of Collective Bargaining Infrastructure, Public and Private Sector, S.A. and U.S.
- Management/Union "Unfair Labor Practices" and Filing Process
- Union strategies for Leverage/Management strategies for Leverage Establishing Bargaining Relationship
- Legal requirements for Bargaining, Notification, Right to Information, Strike Authorization
- Process Overview: Research and Setting Goals, Organizing a Contract Campaign, Role of Negotiating Committee, Rank and File Support Structures, Membership Surveys
- Table Skills

- Permissive and Mandatory Subjects of Bargaining
- Open Negotiations, Traditional Bargaining, New Approaches
- Contract Ratification
- BATNA (Best Alternative To A Negotiated Agreement)

### **Week Two: Grievance Handling and Arbitration Resolution**

- Case Studies, Role Play, Practical Assignments
- Grievances: Role to Address Disputes On The Job and Enforcement of Provisions of C.B.A. (Collective Bargaining Agreement)
- Definition of Grievances
- Investigation and Research
- Evaluation of Merit in terms of Standard of Just Cause, Past Practice, Progressive Discipline, Equal treatment, Applicable Law
- Do's and Don'ts of How to Write An Effective Grievance
- Grievance Steps and Time Limits
- Do's and Don'ts of Presenting Grievances to Management
- U.S. Law Including Weingarten, Duty of Fair Representation, Special Status of Union Stewards
- Legal Rights of Information Requests
- Arbitrations: Analyze Labor Law and Logic Applied by Arbitrators to Grievance Decisions
- Review of Case Studies on Discharge and Discipline for Job Performance, Insubordination, Seniority Application, Leaves of Absences, Management Rights, Union Rights
- Examination of "Seven Tests for Just Cause" Discipline
- Review of Arbitration Process: Evidence in Arbitration, General Evidentiary Issues, Evidence and Grievant, Evidence and Due Process Consideration, Interpreting the Contract, Weight of Other Proceedings
- Selection Process for Arbitrators
- Unions and Management Strategies Regarding Cost and Politics of Arbitration
- Alternatives to Arbitration

### **Week Three: Identified Site Visits in South Africa**

- Interviews, Round Table Discussions

- South African site visits to be scheduled

#### **Week Four: Union Organizational Structure, Administration, and Governance**

- Survey of Union Structures designed for organizing, membership recruitment, internal organizing campaigns, education and training, and membership participation, knowledge, and responsibility
- Structures for successful collective bargaining
- Structures for successful contract administration and enforcement
- Structures for political activity
- Structural relationships between members, local unions, affiliate sector and industry organizations and national unions
- Constitution and By-laws, primary documents and labor law

#### **Month Two: Main Theme—Leadership Development**

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- Classroom work will be held at Morehouse College in Atlanta, GA.

##### **Week One: Overview**

- Defining Leadership
- Role of effective administration, management, evaluation
- Identifying and developing new primary and secondary leadership
- Delegating Authority
- Developing Collective Leadership
- Establishing structures and processes to facilitate democratic leadership
- Leaders as negotiators, mediators, and practitioners of dispute resolution
- Role of leaders in developing a vision, program, and strategy
- Creating inclusive environments

##### **Week Two: Meeting Organizational and Political Challenges**

- Union Leaders as organizers
- Union Leaders as coalition and consensus builders
- Union Leaders as catalysts for social and political change

##### **Week Three: Work-site Visits/Round-table Discussions**

- IBEW 5<sup>th</sup> Regional District in Birmingham, Alabama

- IBEW System Council Four (4) in Palm Beach Gardens, Florida
 

\*\*\*\* Sites involve workers from Georgia Power headquartered in Atlanta, Georgia (owned by the Southern Company) and Florida Power and Light in Florida.
- Round table discussions with IBEW's National Committee on Utility Deregulation and representatives from IBEW, IUE, and other national unions regarding challenges to union leadership and union solidarity in a deregulated, global market.
- There are also plans to visit relevant workers center in the more rural areas of the South. These areas contain some problems of underdevelopment that exist in the US that are similar to those faced by ESKOM and its workforce in South Africa. Visits to the West Coast are also planned. This process is designed not only to give the long term training a nation-wide scope, but also to reflect the uneven development of the US trade union movement.

#### **Week Four: Workforce Diversity and Women as Union Leaders**

- Issues of Gender Equality, examining precepts that “equality” is not a by-product of democracy. There is a need to deliberately confront all manifestations of women’s inequality to ensure that gender equality is an integral part of democratic transformation
- Globalization, women, and gender inequality
- Identifying, developing, and promoting women as leaders in the workplace and the union
- Examining the increasing “feminization of poverty”, especially among African Americans in the U.S. and in South Africa’s majority Black population
- Issues/Challenges to women’s leadership:
  - Women and work
  - Dignity and respect
  - Gender specific impacts of public and economic policy
- Issues of accommodating work force diversity and some of the new challenges it creates will be reviewed. The Focus will be on the Union role in dealing with these issues.

#### **Month Three: Main Theme—Economics**

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- Classroom work will be held at Morehouse, in Atlanta, GA but fieldtrip will be organized to Midwest and West Coast

#### **Week One: “Popular Economics Course for Workers and Union Leaders” (LERC)**

- “Common Sense Economics” with the AFL-CIO Department of Education
- Productivity Gains and Wages
- Stock Market: Barometer of Economic Well Being or Misery Index

- Income distribution and Labor Market Economics
- Economic development, Overtime, and Joblessness
- Politics of Apprenticeships and Training: Skills Enhancement, Education and Power Issues Impacting the Unemployed and Underemployed
- Tax Policy and Working Families
- Budgets and Fiscal Policy
- Minimum Wages versus Living Wages
- Economics of Affirmative Action

### **Week Two: "Unions and Economic Competitiveness"**

- Trade Deficits and Unions: Myths and Realities
- Unionization and the Rate of Growth of Productivity
- Unions and Profits: Impact of Industrial Relations Climate
- Unions and Technological Change: Collective Bargaining, Technological Change and Union Policies, Technological Change
- Unions and Macro Economic problems
- Union Effects on Aggregate Savings and Investment
- Union Wage Gains and Economic Welfare
- Unions Economic Performance

### **Week Four: Globalization and Comparative Political Economy of Industrial Relations**

- Case Studies on the Impact of Global Economic Policy
- Unions, Labor Movements and Industrial Restructuring
- International trends in Work Organization in the Private and Public Sector
- Linkages between economic Development Strategies, Industrial Relations Policy and the Workplace. Case Studies: Japanese; Mexico; Swedish; German; Canadian
- Compare and Contrast with Discussed Trends in S.A. and U.S.

## **Projected Daily Classroom Schedule for the Three-Month training program**

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8:00 – 08:30	Breakfast
08:30 – 10:15	Review Homework/Site Visits, etc.,
10:15 – 10:30	Break
10:30 – 12:00	Classroom Work
12:00 – 1:00	Lunch
1:00 — 3:00	Classroom Work
3:00 – 3:15	Break
3:15 – 4:45	Classroom Work
4:45 – 5:00	Homework Assignment
5:00 – 6:30	Personal Time
6:30 – 7:30	Dinner

## Labor Relations Team for Long Term Program

The Training Team for the Long Term Program will include all members of the Short Term Team. Moreover, it is now perceived that "Resource" Team members will participate as "Instructors" along with the current member of the "Instructors/Consultants." The role of each member of the overall Team, While already conceptually defined, will depend on a more detailed program design. In addition, Morehouse College faculty and students will serve as resource people for the proposed Long Term Program.

Exhibit C outlines the Team composition and some of the roles that have already been assigned.

**Exhibit C**  
**Long Term Training**  
**Labor Relations Team Responsibilities**

MEMBERS	CORE TEAM	COURSE DEVELOPMENT	TRAINING			
			Session 1	Session 2	Session 3	Session 4
Dennis Orton (Leader)	X		X	X	X	X
Ashaki Binta	X		X	X	X	X
Peter Donohue	X		X	X	X	X
Lee Schore	X		X	X	X	X
INSTRUCTORS/CONSULTANTS						
Robert Baugh	X		X			
Hasan Crockett	X		X			
Steven Deutsch	X			X		
Dan Holub	X		X			
Thadabantu Iverson	X				X	
Rene Males	X		*	X	*	*
Landis Mantilla	X			X		
Roberta Till-Retz	X		X			

\* Available in SA for consulting with Team on ESKOM management.

budget  
removed