DEVELOPING COMPETENCY AND SKILLS IN TE WHANAU O WAIPAREIRA TRUST

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Abstract

Te Whanau o Waipareira Trust provides a large range of health, education, social, justice, economic and employment services to its predominantly West Auckland Maori constituency. It operates over a large number of sites and uses a wide range of networks, alliances and joint ventures to deliver its services. It's external environment, like many other New Zealand organisations, is characterised by rapid change and uncertainty. This paper is a preliminary analysis of some of the cultural and structural features of Waipareira and the skilling strategies it undertakes to survive in its environment. Te Whanau o Waipareira Trust is the fourth case study of the FRST funded "Economic Restructuring and Skills Formation" project undertaken by WEB Research.

Increasingly organisations in New Zealand are having to survive in conditions of rapid change and uncertainty. In such an environment, what are the skilling strategies that organisations undertake take and what are they key cultural and structural characteristics of these organisations? These are the two main objectives for the current research programme undertaken by WEB Research titled Economic Restructuring and Skills Formation. Te Whanau o Waipareira Trust is the fourth case study in this project.

This is a preliminary paper because the data has yet to be fully interrogated by Waipareira staff and the research dialogue completed. To date, the data contained in this report was obtained through a mixture of open ended scoping interviews, a questionnaire administered to 26 staff and the review of relevant existing trust documentation. In the first section of this paper, we briefly describe the Trust and its operations. In the second section, we make some early comments on the structural and cultural features of the enterprise and the core skills required by Waipareira staff to operate effectively in its business environment.

Section one - overview

Te Whanau o Waipareira Trust was registered as a Charitable Trust in 1984 under the Charitable Trust Act (1957). It is a pan-tribal Trust and represents approximately 40 organisations in the Waipareira Rohe, some owned and managed by Waipareira but with others just affiliated to it. The origins of the trust lie in the diverse range of groups, particularly the maori Wardens and Maori Women's Council, and the activities they were doing for maori to defray the effects of urbanisation this century. A major event that has helped consolidate maori in the area was the building of Hoani Waititi Marae in the 60s. The loose confederation of maori

groups and networks representing West Auckland maori up to this time was formalised and consolidated under the umbrella of the Waipareira Trust in 1984. The decision to change, from an loose open community forum to a trust, was made mainly to help it access funding and to find favour with funding agencies (Hanna 1994).

Since 1991, under the current CEO's direction, the trust has reorganised itself into a corporate model, adopting clearer distinctions between governance and management functions as well as creating separate stand alone entities for its main areas of operations. At the time of our research, the organisation was going through another change process whereby the corporate office was devolving a lot of its management functions it did for the units, onto the responsibility of the units themselves. The main units and their activities are summarised in table two below. The philosophy is to provide a holistic provision of services that integrates and addresses social, economic, cultural, educational and economic needs of its clients and staff. Or in the words used by many staff a "one-stop shop".

The trust's mission statement (table one) gives a good indication of its intent. Its whakatauaki "to progressively act in unity", gives a good indication of its method of operation, both internally and externally to the organisation. What is particularly interesting is it's emphasis upon process, compared to outcomes, of traditional mission statements.

These services are spread over a number of sites, the main one, or "the heart", is in the old police station at Henderson. Health, employment, and social services are provided here. A number of properties spread throughout West Auckland host their other activities and recently they've set up a PTE site for their courses in East Auckland. This represents an

Table 2. Service units and activities of Te Whanau o Waipareira Trust.

Corporate (Parent)
Research, development, implementation and auditing of new and existing services.

Accounting Services
Financial management of Te Whanau o Waipareira Trust and its subsidiary companies, as well as accounting services for a number of other organisations such as local Kura Kaupapa, Kohanga Reo etc.

Social Services
Support for families by way of budget advice, counselling, anger management, school holiday programmes and day-based youth activities.
Care Service for children and young persons up to the age of 17 years.
Alternative Education Centre.
Prison visits.

Wai Health
General Practice Medical Clinic, baby checks in the home, alcohol and drug education, women's health and information, health checks for women in the community, dentistry, health education and information for youth, kai and nutrition information and training, midwifery.
Parents as First Teachers programme.

Employment (Job Action).
Programme for long term unemployed (2 years or more) to assist them into employment. Networking with employers to find placements for Wai Tech graduates.

Wai-Tech
A Private Training Establishment offering 25 training courses including small business, Maori performing arts, security, automotive, painting and decorating, social work etc.

extension of their activities into a more regional approach. Their Corporate office in New Lynne is a modern four storey glass office block, indistinguishable from many other corporate head-offices. All their buildings and vehicles have the very distinctive Waipareira Trust logo and name painted on them.

Some 70 people in total are employed full-time in providing these services. In addition, there are approximately 200 others who provide regular voluntary work. These include the kaumatua who not only provide a figurehead for the trust, but are also involved as speakers, callers, trainers or teachers, supporters etc.

As well as the service units (see Table 2), Waipareira owns a number of small businesses, the largest of which, NZ Guard Services (a security firm), employs approx 40 people. The Trust also owns an investment arm that comprises a 50% shareholding in a property development company specialising in commercial properties. Returns on their economic investments have predominantly been used in the past to increase their investment portfolio and to repay their debts. Recently they've achieved debt free status and in the future, returns on their investments will be used to fund future activities and operations. Total assets as at 30th June 1996 were $6.4 million.

Management and Governance Structure

The governance of Waipareira is undertaken by a Trust Board consisting of 15 members. 14 members of this board are elected by the community on a triennial basis and the other is a representative of Te Runanganui O Ngati Whatua (manua whenua). Once a month, a Trust Board meeting is held as well as a whanau hui where the community can participate. Both meetings are open for the public to attend. Several trustees are also paid employees of the trust.

Responsibility for the management of the Trust is held by the CEO. Each unit has a manager who reports to the CEO and in turn each manager is responsible for the staff in their unit. Under the current restructuring, unit managers are picking up extra responsibilities for the financial and strategic management of their units. While the different units have variations in their management styles, in general, most employees have a large degree of discretion in their work. This is fitting with the professional nature of many of its employees, either as tutors, doctors, nurses, social workers etc. High standards of professionalism, quality and accountabilities are encouraged, and outside consultants are used when necessary to help develop these systems. Most of the units have completed documenting their operating systems, policies and procedures.

Markets

The majority of Waipareira's services are funded though contracts won from contestable funding pools, such as those of the community funding agency and the Educational, Training and Support Agency (ETSA). The current legislative framework that created the funder/provider split, has enabled them to bid into areas that were not available before. This has been a mixed blessing in many areas however as it has often been accompanied with a total reduction in funding and closure of existing services available for maori in their area. Still, Waipareira is a prolific bidder for contracts and will litigate in court if it feels it is not receiving a fair deal. It has brought a case against the Community Funding Agency for inadequate funding and consultation that it says are rights guaranteed to it under the treaty. Currently, the CEO is in England at the Privy Council defending the High Court decision made in its favour against the Maori Fisheries Commission. In all, Waipareira believes it is seriously under resourced and uses as many mechanisms as it can, backed by moral persuasion, to help it gain funding to deliver its services.

The workforce

To survive in its relatively unstable funding environment, Waipareira promotes itself as an flexible organisation able to upsize and downsize according to need. Often it will bid for contracts that it doesn't have the current capacity to deliver. If the bid is successful, then the resourcing of the contract will be focused upon.

Most individuals are only guaranteed work for as long as the contracts they're servicing are valid. Most contracts, such as those of ETSA and CFA need to be renewed annually, and others, such as a recent voter enrolment project, are one-off. Despite, a low employment guarantee, some potential exists to shift staff around between units and work contracts when possible. In addition, there is a high expectation that because of their very good reputation in delivering their services, many of their funders could not possibly decline them future contracts.

It is generally accepted that the vast majority of staff are paid below market rates, however this is not always the case. To attract key skills sets, some staff are paid at rates competitive with market ones. For most staff however, they could be earning in excess of what they are paid at Waipareira. There are a number of other benefits that include an "informal employment package (access to free health and staff development opportunities such as scholarships to go to polytech and university). In addition to this, Waipareira tries to provide a "family friendly" workplace where family demands/issues are accommodated and respected. For instance, this may include bringing children to work when staff cannot find alternative childcare, or shifting work demands and hours of work to help suit personal family circumstances. However, there are also contradictions in its' "family friendliness" due to the demands that are placed upon staff members and the effects of this on their families (see below). Nonetheless, many see their work they are currently doing as building a future for their children, their

mokopuna and generations to come.

Most people work for Waipareira because they strongly believe in the value of the work they are doing as well as the overall mission of Waipareira. Waipareira provides hope, it gives people a sense of belonging and is a vehicle for extending maori achievement and aspirations. For these reasons, most people accept the poor wages and long hours as it's not so much a job but a lifestyle as well. The catch side of this is that the high demands, coupled with low remuneration, put high pressures on the individual and their family and too frequently resulting in staff "burn-out". This is a major reason why in the past a high staff turnover exists although there is some evidence that this may be stabilising.

While Waipareira does not offer people long term job security, there does appear to be an alternative security that they do offer - "employability". Waipareira strongly encourages it staff to upskill and multiskill, and to undertake training and educational activities. These may sending a staff member on a short course or hui on work related subjects, or the payment of fees while one attends a degree course at university. It is not uncommon for a staff member to take leave from Waipareira for several years to attend tertiary courses and then return to Waipareira. Each case is treated on its own merits, and fees and course costs will be refunded (in full or sometimes in part dependent on cost) once passed. While employed with the trust, Waipareira staff are also expected to undertake a wide variety of tasks and hence learn skills in many different areas. All staff we spoke to believed their skills were transferable to other organisations and typically they gave reasons that included their multiple skills, their high levels of productivity and ability to manage difficult situations, and well developed communication skills. One manager did have a qualification to make to this in that:

...moving up in the corporate sector is unlikely because of the different values that Waipareira operates with. Waipareira values are more about creating opportunities.

And as another staff member said referring to Waipareira:

The opportunities here are awesome. A place where you ask for one option and instead you get 50.

Section two

In this section, we begin presenting our preliminary conclusions about the cultural and structural factors that contribute to Waipareira's success.

Recruitment

Waipareira intendedly delivers a wide range of professional services, eg. dentistry, general practice medicine, women's health, legal services, TOPS courses, counselling, social work and others. A core of key professional staff committed to the vision of Waipareira are recruited at less than market rates.

Specialist staff recruited bring not only occupational skills,

but also key strategic and operating knowledge and contacts made in their previous employment with agencies such Maori Affairs, Te Puni Kokiri, The Department of Justice, Inland Revenue, Department of Social Welfare, Health Authorities and other funding or policy agencies. They bring knowledge of the sources of funding, the official requirements to be met, of policies and procedures, of wider management systems to Waipareira and they bring access to sources of knowledge and support through their social and professional networks. So we find a trustee who is a security tutor at Waipareira, formerly employed by the New Zealand Police, drawing on contacts he made while in the Police and from the judiciary to bring representatives from these organisations to his classes as guest tutors. Replicated across its services such a networking and relational capacity strengthens the existing, and forges new relationships between Waipareira and organisations operating within Waipareira's business environment.

'Can Do' philosophy

Waipareira holds to and promotes an approach to human resource recruitment, training and management which can be approvingly described as a 'can do' philosophy . The philosophy permeates the organisation. On the one hand it is an expression of the organisation's willed capacity. The trust is a prolific bidder for contracts. It bids into areas where the resources or skill sets needed are not, at the time, held in the Trust. However once the contract is secured staffing and skills are mobilised either from within existing proximate staff and skills, 'deep ending' those adjudged to be likely to succeed or by recruiting new staff.

The 'can do' philosophy is promoted by Waipareira leadership at an individual level as well. This means placing a strong faith in the potential of people and placing them in jobs sometimes thought by the individual to be beyond their capabilities. A rapid course in learning is frequently needed causing some staff to express a sense of being 'dumped in it'. Waipareira management maintain the policy by stating that support is always available. While for many staff this was true, several noted that sometimes they had to be 'pretty assertive' to ensure they obtained the necessary help.

Knowledge and networks

The notion of 'knowledge workers' has been used to describe the work and habits of the employee of the future. Research scientists, software analysts, film producers and directors, publishers, lawyers, management consultants and the like are identified as the "creators, manipulators, purveyors of the stream of information that makes up the post-industrial, postservice global economy (Rifkin 1995: 174).

Many of Waipareira staff could, on such a definition, be classified as knowledge workers. In Waipareira's context, staff execute their work using social technology to access, retrieve and process the knowledge they need to do their work as tutors, social workers etc rather than information technology.

In addition to their immediate knowledge needs, the intention to deliver a holistic service requires an assessment, even if rudimentary, of client needs and an awareness of additional services they may be referred to (for example a student in Wai Tech may need referral to Wai Health). Waipareira staff source the knowledge and information they need from and through their networks, both formal and informal, internal and external. It is not as important for Waipareira staff personally, to hold the knowledge they need for their work, as it is for them to know where and how they can access it. Such networks provide a richness that customary knowledge gathering methods, information systems management, cannot achieve. Powell 1990 gives a good understanding of the power of knowledge in networks compared to that in markets and hierarchies:

> One of the key advantages of network arrangements is their ability to disseminate and interpret new information. Networks are based on complex communication channels. ...they are particularly adept at gathering new interpretations; as a result of these new accounts, novel linkages are often formed. This advantage is seen most clearly when networks are contrasted with markets and hierarchies. Passing information up or down a corporate hierarchy or purchasing information in the market place is merely a way of processing information or acquiring a commodity. In either case the flow of information is controlled. No new meaning or interpretations are generated. In contrast, networks provide a context for learning by doing. As information passes through a network, it is both freer and richer; new connections and meaning are generated, debated, and evaluated (Powell,1990).

Meetings and Hui.

We concluded early in the study that the operational and service delivery requirements of Waipareira must mean complex networking, but we were not prepared for the adaptation of traditional meetings and hui that we found, nor the astonishing frequency of them.

To deliver on its mission and to manage its operations, Waipareira typically holds some 92 meetings a month thoughout the whole organisation and its membership. These meetings range from Monday morning staff meetings to management meetings, meetings of the Trust Board, of kaumatua and whanau meetings. In addition Waipareira often hosts hui dedicated to specific issues or matters of interest to the Waipareira community. We attended a hui one evening on alternative education because the Trust wanted to redress the problem of truancy and the failure of mainstream education. Many different organisations were present, including local District Court Judges, Ministry of Education officials, Dept of Social Welfare social workers and others. What emerged was a strong expectation of, and ability to action, remediation strategies and three working parties were set up immediately to follow through on the points and initiatives raised.

The social nature of many of the meetings provide opportunities for training activities to be included as a part of the

process. The annual staff hui, which was attended by one of the researchers, illustrates this well.

The day began with a formal powhiri at the local marae, Hoani Waititi. Once inside the marae, staff took turns to introduce themselves and explain their role in the organisation. Unit managers then presented their business plans. After lunch, debating teams were selected and two debates held. In between the debates, the remainder of the staff were involved in team games involving problem solving. All activities held on the day had people, previously selected, who stood before the assembled staff and reviewed presentations and gave feedback to the staff about their performances.

Many learning opportunities were constructed for the day. Staff self-introductions told others about the person and their alignment with the mission and values, the variety of Waipareira's activities and the range of skills and knowledges available for those needing support later. Articulation of the business plans gave the sense of strategic of their respective units and an overview of the Trust's directions. The two debates provided excellent professional development in public speaking and modelling. The content of the debates gave listeners insights into current issues for Waipareira, though such were more likely to come second place to the deliberate humorous content of the debates. Finally, the team game gave people an opportunity to experience the benefits of collaboration in group problem solving.

We could not ignore the powerfully affirming function of the hui for the mission and values of Waipareira.

Core skills

Recent literature (Capper et al 1995, Engestrom 1991) point to emerging problematics in traditional conceptualising of skills and expertise in today's environment of rapid change and uncertainty. Existing and traditional literature on skills and expertise rests on a paradigm with the following propositions:

• Expertise is universal and homogenous. Its technical features exist independently of any cultural or historical context.
• Expertise consists of the individual mastery of tasks and skills, and once gained in consistent and largely invariable.
• Expertise is gained through repeated experience and practice.

The operationalisation of this behaviourist model has underpinned the developing social organisation of work. The assumptions were fundamental to the medieval guilds, the formation of trade unions and Taylorist principles of scientific management.

In recent years, developments in cognitive science (Johnson 1988, Brehmer 1980) suggest that this model of the social organisation of work is restrictive and holds only to the extent that stability and certainty prevail. The model does not hold in an environment of rapid change and uncertainty.

Under these conditions the traditionally emphasised "hard skills" (observable psycho-motor and cognitive skills) lose their superiority to "soft skills" (process, interpersonal, cognitive and affective skills) as these skills are the enduring requirements of effective work practices which enable staff to adapt to change and uncertainty and to function in teams and networks.

As part of our research, we administered a questionnaire that included a question about staff skills. A stratified sample of staff were asked to list the five most important skills they used in their jobs. Their replies are summarised in table three according to the skill taxonomy developed by Field (1990). Field's taxonomy is based upon the following five categories - task related, task management, work environment, workplace learning and workplace relational).

Table 3: Five most important skills respondents used in their jobs

Skill category	Times mentioned
Task (eg computer, financial management, trade specific)	22
Task management (eg coordination, planning, management	22
Work environment (cultural sensitivity, understanding the Kaupapa/vision, assertiveness, life experience, resourcefulness)	15
Workplace learning (eg adaptability, teaching, creativity)	16
Work relationship (communication, interpersonal, compassion, honesty, integrity, respect, supportiveness)	49

Cognitive and affective skills such as communication, interpersonal and honesty compassion (workplace learning, work relationship and work environment) were frequently listed. Hard skills (task and task management) were mentioned less frequently. The replies suggest congruence between the skills they had self identified and the types that are becoming increasingly important under the new skill paradigm.

Upskilling/multiskilling

We asked staff to rate the level of change that had occurred in their entire skill set over the last two years. Table 4 summarises their responses.

Table 4. Extent that skills used in job have changed in the past two years

	%
No change at all	8
To a little extent	15
To a moderate extent	27
To a large extent	50

Some 77% reported changes from a moderate to a large extent. There appeared to be several reasons for such a large level of change.

• The philosophy and practice which guided how work was organised and allocated;
• The nature of the work (holistic delivery);
• Mobility of staff between units and contracts, voluntarily or not;
• The encouragement of personal development

The nature of the last dimension distinguishes Waipareira from many other organisations. Modern business or service organisations (c.f. Local Bodies) typically have an instrumentalist rationale for promoting upskilling/multiskilling eg. human capital creation, reward systems, certification/training strategies. Such equate the need to multiskill as a means to the implicit or sometimes explicit, organisational priorities of the company, profitability, returns to shareholders, savings on contracts, avoidance of job losses and so on. Waipareira shares some of these drivers but goes further and innovatively. Upskilling and multiskilling maori is a part of the vision of Waipareira for maori in general. As such, upskilling/multiskilling is seen as an end in itself. This view is congruent with many other of the distinctive values and beliefs Waipareira was developing and adopting. Holding the view and its attendant values is not difficult, Waipareira however has determined to operationalise the belief; this is a considerable task and has large resource implications for Waipareira.

Maoritanga

Waipareira is a dynamic entity which interacts with its context and environment in creative ways. Best exemplifying this is Waipareira's operational strategy for adapting and reconstructing the received cultural-historical principles and practices of Maori that they need to adapt. The organisational model they've adopted in West Auckland draws on the traditional concept of whanau. It is their attempt to reproduce the sense of community, belonging, aroha, support and associated principles of whanaungatanga for urban maori. The key whanau concept is of maori as oneness. In this concept all maori are interconnected through whakapapa. Such a reinterpretation of traditional social structures enables the Trust to take its pan-tribal stance.

In legitimising such pragmatic cultural reconstruction, kaumatua play a significant role as adjudicators between the old and the new and as shapers and legitimators of those new 'traditions'. To add such a profound cultural realignment to the tasks of the organisation within the broader political and economic context of competing reinterpretations of traditional maori principles and practices surrounding Treaty claims and settlements is to add to the risks of the entire venture. That Waipareira has accomplished as much as it has, and, given the decision of the Privy Council, as much as it might, we will be interested to observe the degree to which the dynamic around culture continues to generate internal conflicts requiring management.

In Waipareira, staff are not viewed as a means to an end but as having a unique value in their own right. The view is that individuals carry mana and are tapu and should be treated with respect and dignity. These are fundamental values and essential to equip staff to participate in the participative dialogue and decision making encouraged in the Trust as the process can often lead to heated debates and conflict. While these conflicts and debates may sometimes spiral away from being constructive, they can also provide powerful learning opportunities.

As with other Maori organisations, Waipareira has evolved from a determination to address the lived needs of Maori. It has developed an organisational form and management system under the influences of both the industrial capitalist environment and public expenditure legislative framework it resides in, and by aspects of Maori culture. The long term goal is self-determination, what this means and how it might be achieved is a lively, ongoing debate. Waipareira adopts a flexible, pragmatic approach when reinterpreting and applying Maori culture and te reo. This is far removed from 'making it up as they go along', rather underlying principles and protocols are always present, while visible manifestations of these may be variably applied according to the context in which they are used. Concepts integral to systems of maori values and ethics, such as tapu, mana and kotahitanga (see Henare 1995), form the basis for many of these underlying principles.

Discussion

Waipareira intends to be, to create and to service the whole needs of, a community. The business of Waipareira is the construction of a community, to that extent Waipareira is a cause. Not only is this organisation counter-cultural in a capitalist sense but by being pan-tribal at a time when there is likely to be substantial material benefit in identifying with an iwi, the Trust appears to have set itself in the face of established Maori cultural understandings as well. Both rationales add profound demands upon the organisation and require sophisticated communication, management and values/mission affirming behaviours to be experienced internally and demonstrated externally.

It appears that the success of Waipareira began with the establishment of a highly qualified staff committed to a vision for maori in the future. That vision and the results of that vision have helped create an organisation and a community highly committed to redressing the needs of maori in West Auckland. That vision is based upon the goals of self determination and collectivism and is an attempt to create a different reality to that being imposed from an industrial capitalist society still heavily influenced by its colonial past. In this respect, Waipareira Trust serves as a buffer or mediating institution between lifeworld (maori culture and whanau) and systems (national and local government bodies and economy), and seeks to reverse the colonisation of the lifeworld effected by the increasing penetration of the twin forces of bureaucratic power and instrumental rationality (Sissons 1995: 65). It does this either by winning contracts for service delivery itself, or through various forms of

influence, by encouraging traditional bureaucratic providers to act in ways more congruent to the concerns and needs of their clients. However being located in this middle position creates tensions and contradictions, between, on the one hand, the consensus and democratic nature of the lifeworld , and on the other, the bureaucratic and instrumental nature of public funding bodies and the business requirements of an organisation seeking to optimise performance in a capitalist economy.

In order to win contracts, Waipareira staff needed to know the language and tools of funding agencies in order to successfully procure contracts to service their people. To successfully deliver their contracts in a culturally driven holistic manner, they must develop extensive networks both internally and externally to the Trust to access the knowledge they need. Much of the coordinating of work and the development of these networks occurs in meetings and huis, as well as other activities that help develop the relational, communication type skills required to effectively work one's networks. Under this model, the traditional model of skills and expertise is obsolete, and to a large extent, staff are consciously aware of this through the types of skills they self identified as important for them in their jobs.

The soft skills that staff alluded to, help the learning and development of the multiple skills staff need in their jobs. They help facilitate the process of learning and to find and access the sources of help when it's needed. Cultural values help reaffirm and re-establish maori identity and self esteem, in an environment that for the most part is highly supportive. Those same cultural values encourage a large degree of forthrightness and participation, while at the same time, other ones come into play to ensure that the learning opportunities they potentially present are not lost.

Future research

The current project has focused upon those cultural and structural factors organisations require to survive in an environment of rapid change and uncertainty. Future research is needed into the actual cognitive and communication processes that produce creativity and innovation in changing and complex work environments. WEB Research has currently begun a new 4 year research program into this area and which is linked to other studies carried out in Finland, Japan and America with an intent to produce cross cultural comparative data and understandings.

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