

## **Analysis of an organisation: A University of the Third Age (U3A), Mornington, Victoria**

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U3A, Mornington

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*The purpose of this paper is two fold: to look at Mornington U3A in organisational terms and then look at U3AM as a loosely coupled system. One outcome of the study would be to undertake further analyses of U3As in Victoria to determine the levels of bureaucracy under which each operates. Questions to be asked: are U3As in Victoria operating as bureaucracies and so need to be loosened up? Or are they run as organisational anarchies and need to be tightened up?*

**Keywords:** organisation, loosely coupled systems, bureaucracy, collegial, rational, mechanistic, anarchic, goals, efficiency, effectiveness.

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### **Mornington**

Mornington, fifty seven kilometres from central Melbourne is a sea-side resort for holiday makers, but more recently people have been arriving to settle in the area resulting in the construction of new apartments,

houses and retirement villages. Mornington U3A has benefited from this rapid growth. Many members are qualified in computer technology, dance and choral singing, painting-oil and watercolour, and language teaching. They include retired medical and legal practitioners, health professionals, architects, psychologists, policy advisers to government, theologians, university administrators, clerical staff from Winston Churchill's underground bunker and the Royal Marines. So there is no shortage of people with interesting backgrounds who take part in the number of courses that Mornington U3A has to offer.

### **Mornington U3A as an Organisation**

Kast and Rosenzweig (1979: 237) stated that organisations are composed of individuals, the fundamental units of analysis in organisation theory. Individual behaviour patterns are the result of complex factors and represent an integral part of the psychosocial system. Behaviour, the way a person acts, refers to conduct and the way an individual carries out activities.

In regard to the first aim, *i.e.* to look at U3AM in organisational terms we could ask what factors determine if a group of people constitute an organisation? We could ask if a music appreciation group or a book club or the Red Cross are organisations? What are the differences between these types of groups? In regards to Mornington U3A as an *organisation*, March and Simon (cited in Tsoukas and Knudsen, 2003: 613) defined an organisation as a 'system of co-ordinated action among individuals and groups whose preferences, information, interests or knowledge differ'. We could also say that an organisation is 'just a group of persons associated by some common tie or occupation and regarded as an entity'. This group might later evolve into a bureaucracy or *adhocracy*. Organisations compete for their most valued resource *viz.* knowledgeable and qualified people, and Drucker (1988) writing on organisations in the future thought they would probably look more like hospitals, universities or symphony orchestras. By this he meant that organisations of the future (*i.e.* 2017) would be 'knowledge based and composed of specialists' in their respective fields'.

Organisation theory (OT) is an academic field which specialises in the study of organisational phenomena (*ibid.*: 15). It explains the genesis, the functionality, the transformation, the interrelated concepts, the

assumptions, and the generalisations that occur in organisations. Organisations are a permanent part of our lives, but what is it about them that makes them so relevant? We know about the functions and features of organisations such as the Australian Taxation Office, but in the case of Mornington U3A this is not quite so simple.

An organisation may exchange material, energy, people and information with its environment. Mornington U3A has developed a relationship with local schools, the community, the shire council and when appropriate the State Legislature. It has developed an innovative, intergenerational program with the local primary school where U3AM members assist in teaching reading and literacy. Representatives from all three levels of government attend major U3AM functions as appropriate.

### **Background and Context of U3AM**

Mornington U3A provides programs, courses and activities for an increasing number of senior citizens/retirees who want to learn something (or re-learn something that they had learnt years ago). They are thus keeping themselves mentally active and socially involved. Tsoukas and Knudsen (2003:7) described this complex process as ‘the production of knowledge for use as a practical social activity’. Generating knowledge involves work and activity *i.e.* transforming matter/symbols for human purposes, and communicative interaction or sharing meaning in a community of inquirers. These activities might include learning French, German or Italian for that long awaited overseas trip; taking part in physical activities such as cycling, dancing, bush walking; taking an active role in social-cultural activities such as music appreciation classes, participating in choral singing, engaging in local history research; or being purely social and physical, and taking part in activities with other like-minded people.

Mornington U3A is run entirely by volunteers who handle the tutoring, clerical and administrative tasks associated with a complex adult education facility. In voluntary organisations there are no clearly defined lines of authority with the power to hire and fire, but there is an informal network, which appears when major issues need to be resolved. Voluntary organisations depend to a large extent on ‘goodwill’, and a handful of perhaps two or three dedicated personnel who have the

knowledge, expertise and skills to keep the organisation functioning.

Mornington U3A was established in 1991 with 42 members. It has now 100 + tutors, 225 courses, a committee of 14, and 40 volunteers who assist in the day to day running of the organisation. The number of students is currently 1,124 an increase of 5% on last year's enrolment. This number is expected to increase in the coming years, meaning that a lot more people are signing up for a lot more courses resulting in a greatly increased workload for the (overworked and sometimes stressed) voluntary office staff.

## **Learning Activities of U3AM**

In addition, an organisation should have a goal, aim or purpose, which gives it direction to perform effectively. The goals/aims/purposes of U3As are to make retirees: aware of their intellectual, cultural and aesthetic potentialities; aware of their value to themselves and to their society; provide from amongst their members the resources for the development of their intellectual, cultural and aesthetic lives; and create an institution for these purposes.

Some people have a need for high achievement, and an increase in self-esteem and self-actualisation. For example, there are some in U3AM who choose to read the poetry of Sappho, Virgil and Catullus, the comedy of Aristophanes, Plato's views on justice (even in English he is difficult to follow), and Cicero's legal arguments, and all in the original Greek and Latin. They rise to the challenge of discovering that Plato is using the aorist optative part of *fēpō/fero* (meaning to bear), an irregular verb, in 'The Crito' that tells of the death of Socrates; or when Virgil, describing 'The Death of Dido' writes *fando*. Here Virgil is using the gerundive form of the verb *for*, which comes from an irregular verb meaning 'to speak'. All of these puzzles or challenges require enormous amounts of patience, time and application. Of course these activities do not suit every body in U3AM! Some members and even some lecturing staff have been known to prefer a wine and cheese evening, or begin a course in watercolour painting.

Other students have a need to up-skill *via* the ever popular computer courses. Recognition of achievement is a critical factor for those in textile arts, watercolour, oil painting, drawing and performing arts

courses. Admiring crowds attend the displays of art works and listen to the choir recitals whenever they are arranged.

## **So What Type of Organisation is Mornington U3AM?**

Does U3AM have a collegial approach when solving its problems? Is it a mechanistic organisation similar to any bureaucratic/government department? Is it a rational organisation, with every decision carefully thought through and members making extensive use of the latest management theories? Is it just a large, informal, voluntary organisation justifying its existence by providing courses for people who are merely looking for something to fill in their days? Perhaps it is none of the above, but is really a model described in management writings as a 'GIGO' model i.e. 'garbage going in and garbage coming out'.

A *collegial/organic* model can be identified by the number of highly motivated and ultra-keen individuals who work or say they want to work there. Group loyalty, shared decision making, mutual support and joint planning are all very evident. The goals of an *idealistic* organisation are often developed together where everybody has a say in what goes on. A *bureaucratic/mechanistic* organisation has a rational structure and super efficient work routines. The Australian Taxation Office or a Local Shire Council would be examples. This type of organisation is (or would like to be) seen as impartial and objective. A sense of order would be obvious in the way the organisation was run. In a *rational/scientific* management organisation, such as a medical or scientific research unit, scientific method is the preferred *modus operandi* rather than an individual/idiosyncratic approach. The best person available (one presumes) would be selected for the job, and standards, procedures, objectives and outputs would be carefully defined and followed.

In a Garbage Can (organised anarchic GIGO theory) model, the goals and technology of this organisation would be ambiguous, fuzzy and unclear. The activities of such an organisation would be uncoordinated and loosely connected. For example, a number of post-secondary educational training institutions that provide courses for overseas students recently received a lot of adverse media publicity. They fit into this category where the goals or aims of their institutions are poorly defined.

Mornington U3A selects the most appropriate parts from all four of the models above depending on the particular circumstances at the time. The prevailing model has yet to be determined.

## **What Do People Do in Organisations?**

Tsoukas and Knudsen (2003: 11) raised questions such as: ‘How do individuals make sense of their task and with what consequences? What do people do when they work in an organisation? What makes a group of people an organisation? How do organisational members sustain a sense of community? How do gender and ethnicity influence organisational politics? How are organisational objectives and policies set, by whom are they set, and with what consequences?’

Handy (1984), management guru, public speaker and social philosopher, asked in a conceptual sense, *inter alia*, ‘What is an organisation? Why do organisations exist? For what? And for whom?’ He stated that these were philosophical questions. Drucker’s (1998) argument was that the purpose of an organisation was ‘to get the work done’, and Parsons (1968) identified key indicators or major characteristics of organisations. Some of these issues are addressed in *The Routledge Companion to Philosophy in Organisation Studies*, 2016.

## **Organisational Goals, Structure and Technology**

Organisational goals can be *official, operative or operational*. ‘Official’ (usually) implies that the specified goals will be vague and (possibly too) general. ‘Operative’ means the organisation’s goals will be more specific and (hopefully) more useful and then there are *operational goals*.

Derived from *operative goals*, *operational goals* are set out in detail, so that the activities of the organisation can be more readily evaluated and understood.

Formal structure refers to the relationships among the parts of an organised whole. In this regard, Mornington U3A could be viewed as bureaucratic *i.e.* it has a central administration, a fourteen member committee of management consisting of president, vice president, secretary, treasurer, course coordinator, data base coordinator, office manager, maintenance supervisor, newsletter website manager, social organiser, marketing manager, intergenerational manager, committee

secretary and minutes secretary.

Weber cited in Hatch (1997: 171) described the *ideal* bureaucracy. It would have a fixed division of labour; a clearly defined hierarchy of offices based on competence; candidates for positions to be selected on the basis of technical qualifications and appointed-not elected; officials to be paid fixed salaries; promotion to be dependent upon the judgement of superiors; and rules to govern the performance of officers-meaning that strict discipline and control in the conduct of offices were to be expected.

Weber was describing the *ideal* arrangement with professional, salaried personnel responsible to those in higher authority. U3As are run by volunteers and do not meet any of Weber's criteria for an 'effective bureaucracy'. Yet despite a *quasi-bureaucratic* structure, Mornington U3A is successful in meeting its organisational goals.

In respect to the successful integration of structured activities with members who are studying, practising or learning a new subject/skill, Mornington U3A has developed structures which accommodate members working together in interdependent relationships in the various classes.

Kast and Rosenzweig (1979: 176) defined technology as 'the application of knowledge for the more effective performance of certain tasks or activities' or technology is 'the organisation and application of knowledge for the achievement of practical purposes'. Technology converts spontaneous behaviour into behaviour, which is deliberate and rationalised, and is linked to achieving efficiency and rationality.

Perrow (cited in Daft, 1989, 147) identified four major categories of technology *viz.* routine, craft, engineering and non-routine. The two technologies most relevant to U3AM are 'routine' and 'non-routine' technologies. 'Routine' technologies are characterised by little task variety and the use of objective computational procedures *e.g.* much of the enrolment process and allocation to classes is routine. These procedures are formalised and standardised with the participants undertaking most of the work themselves. 'Non-routine' technologies are characterised by high task variety and advising new comers into appropriate classes or courses. Some of these new comers may have

come from a wide range of occupations, plus a number of people who now want to study a language denied to them while they were at school.

## **Organisations in the Future**

Organisations today differ from organisations of the past, and organisations in the future will be different again. We can only guess, but it might be expected that any future U3AM will be more innovative in course offerings, more conversant with the latest developments in educational and technological know-how, and more able to cope with competition from other organisations keen to usurp some of U3AM's functions. An increase in the expertise of directing staff will also be obvious for all to see.

To ensure the survival of an organisation such as Mornington U3A, a range of issues will have to be addressed. *Leadership*: who would want to take on the challenge of guiding and directing a complex adult education facility, and in a voluntary capacity? *Strategy*: would the new U3AM muddle through on a day-to-day basis or would it engage in a series of (time-consuming) discussions/workshops/round tables where long term planning would be carried out, and major decisions decided upon? *Decision making*: who would make the final decision in regards to courses, programs or the future direction of U3A? Would the responsibility of decision making be given to an individual, a committee, or a sub-committee? Would it be an executive decision, a consensus decision of the membership or a plebiscite? The time involved in decision making would also have to be considered. Some members have neither time nor inclination to engage in long term planning, and then sharing the moral responsibility of seeing their plans put into action.

*Diversity*: In the Australia Day celebration, 26 January 2016, a colourful procession of local ethnic groups paraded through the main street before a large and appreciative gathering of local townsfolk. Amongst the marching groups were people from different ethnic backgrounds who now reside in the area. In a scan of current members, there are no representatives from the ethnic groups who paraded so colourfully on Australia Day. Diversity, in all aspects, is part of Australia's changing scene. If all U3As were to include representatives of the different cultures with examples of their music, art and dance, such additions would add a richness and diversity to the range of courses and offerings currently offered.

## **U3As as Loosely Coupled Systems**

In regard to the second aim of the paper, Hoy and Miskel (1982) have argued that the concept of *loosely coupled systems* is another way of looking at organisations, which are both bureaucratic and educational. The concept of 'structural looseness' recognises both the bureaucratic and the structural looseness of an organisation when looking at complex educational systems or institutions. In a loosely coupled system there are two basic organisational domains, a tight bureaucratic one, with institutional and managerial values to the fore; and a loose professional one involved with the technical processes of teaching and learning. Karl Weick developed the idea of *loosely coupled systems* when he was analysing bureaucracy in educational institutions and systems. On a superficial level Mornington U3A has a bureaucratic structure, and as an adult educational institution it provides a ready made platform for detailed analysis in regard to the concept of *loosely coupled systems*. Weick's argument was that elements or subsystems in educational organisations were tied together somewhat loosely rather than tightly as in a bureaucracy. Further, some educational institutions have ambiguous goals, unclear technologies, fluid participation, uncoordinated activities, loosely connected structural elements and a structure that has little effect on outcomes. Analyses like the above are known as loose coupling theories and are useful in addition to bureaucratic theory. Tutors and lecturers need academic freedom to make professional judgements, and professional autonomy seems now to be standard in many educational institutions. Tutors usually work alone and have broad discretionary authority over what they actually do in their classrooms. This results in structural looseness *within* the organisation. Structural looseness can also exist among the different units in a system. This really means that both the smaller, individual organisation and the larger system within which the smaller one operates depend to a large extent on confidence in each other, the system in which they operate, and the belief that the approach works. In the case of Mornington U3A, each of its programs or courses seems to operate efficiently and effectively.

## **Efficiency and Effectiveness**

The retiring Course Controller, in a valedictory speech in early

2016, referred to a ‘major problem’ in regard to the organisation’s effectiveness. This related specifically to enrolments procedures, where the administrative (volunteer) staff are asked to amend enrolment forms when new members (frequently) change their minds about what they want to do, a practice which increases the workload of the voluntary staff. So there are a number of issues in respect to U3AM’s effectiveness, all of which would have to be addressed and resolved at some stage.

In relation to the criteria of ‘efficiency’ and ‘effectiveness’, committees of management must determine if the stated goals of their organisations are being met, and the organisation is, therefore, ‘effective’. The same committee must decide if the organisation has the ability to carry out its tasks avoiding waste in money, time, effort and energy, and therefore be considered ‘efficient’. ‘Efficiency’ being a measure of the extent to which input is well used for an intended task. These are two major challenges of any voluntary organisation such as Mornington U3A.

## **Future Directions**

If a researcher in adult learning, with an interest in organisation theory or a current member of U3AM with experience in the practicalities of running U3AM, were to undertake analyses of other U3As and investigate the level of bureaucratic process under which each U3A operates, any findings of this research would add to the general knowledge base and well being of all U3As. Questions to be asked might include: are U3As in Victoria operating as bureaucracies and need to be loosened up? Or are they run on organisational anarchic lines and need to be tightened up?

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## About the Author

**Michael Small** has been a tutor at Mornington U3A for eight years. This means that he also is a retiree, but chooses to tutor to other retirees interested in Latin, Greek and Current Affairs. An earlier career involved appointments in a variety of educational institutions in Australia and overseas.

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