

Tutor Notes: Education, Reflection, Action

These tutor notes have been prepared to help you if you wish to use the IMF manual "Education, Reflection, Action" as the basis for training educators or study circle leaders. They give guidance and comments on the 37 activities that the manual contains. As the manual has been designed as a general resource you will need to select key activities that meet the needs of your particular target group. An estimate of the time each activity might take is provided. This estimate includes time for reporting back and summarising key points.

When constructing your own timetable from the activities and materials in the manual we suggest you build in plenty of time to reflect not only on the content of the course, but also the process. The group activities you use in the course can serve as examples or models themselves.

- If you start the course with an icebreaker you can ask what advantage this has for the tutor or what other icebreakers participants experienced that they liked.
- If you use a role play you can promote a discussion about how well it worked and how it might be strengthened.
- If you use a number of small group activities in a day with different report back styles then you can reflect on these and examine the strengths and weaknesses of each type of report back.
- If you mix up some small group activities with some whole group activities that you can discuss where you might use one as opposed to the other.

The capacity to reflect on the educational methods you use to train trainers or study circle leaders is an important element in any training programme.

Introduction

The introduction to the manual (page 5/6) may be useful to explain at the beginning of a programme. The aims of the manual can be adapted and changed to provide the basis for the aims of a train the trainer's course or study circle leaders course. If you are using the manual as a main resource then it may also be useful to go over the different uses of the manual and in particular to emphasise its usefulness as a resource.

Part One: Adult Education and Union Education

This first part of the manual is designed to look at some general principles of adult education and examine these principles in relation to union education. These are then explored in relation to three short case studies that explore how these principles have been put into practice by radical educators and social movements like trade unions. The purpose of the case studies is to give concrete examples of adult education principles being put into action.

Activity 1: The nature of adult participants.

This is an important activity and the central message you are trying to get across by using it is that adults will bring both positive and negative things with them into the training room or study circle.

It is as an example of a snowball activity where participants first work in pairs then fours. You may continue the snowball if you wish. By using a snowball at the beginning you are demonstrating the value of collective decision making right at the start. There is some text explaining snowball activities on page 54.

Putting all the positive ideas on one side of a line drawn in the middle of a white board and the negative ones on the other side has two main uses. You can collect all the ideas together in one place. It is then straightforward to move to stage four of the activity which involves promoting a discussion about how the educator may attempt to turn some of the negative factors into positives.

Estimated time to complete all stages: 90 minutes

Activity 2: Your own experience

This activity is designed to make participants think about their own experience of education and training in relation to the key principles of adult education identified in the text. Small groups can be given different principles to relate to their own experience. The activity asks for both positive and negative experiences. The report backs can be made by summarising the groups' experiences on a flip chart or by asking them to talk about them.

This activity can be useful if you are training educators or study circle leaders for the first time. If they have no experience as an educator they will have some experience as recipients of education and training and can reflect on this.

Estimated time: 60 minutes

Activity 3: Union values and adult education

This activity seeks to make the link between union values and adult education. Participants are asked to agree what the key values of their union are and then relate these to both the adult education principles and the case studies. The purpose of this activity is to indicate that union values are central to union education and that there are links between adult education principles and these union values. It also promotes the idea through the case studies that action and change are central to union education and that union education is not just technical. This introduces the concept of active learning, which is summarised on pages 15/16.

Estimated Time: 45/60 minutes

Summary

When training education officers or study circle leaders it is useful to start with some of the wider issues of adult education and union education. Activities one and three have both been piloted in Australia with shop stewards (union reps), who were being trained to become member educators or study circle leaders. They found tackling this wider

context challenging at first, but worth while on reflection. Looking at the link between union values and adult education principles makes a valuable connection. Activity two is perhaps best seen as an alternative to activity one and it is unlikely that you will need to use both of them in the same course.

Part Two: Union Education Aims and Programmes.

Part two of the manual looks more closely at union education, its aims and programmes. The early part of the text suggests some of the main aims of union education. This is followed by four case studies of union education programmes in four different IMF affiliated unions.

Activity 4: Your own union education programme

This activity helps participants look at their own union education programmes and compares them to the general aims in the text. Participants can add to the aims in the manual or suggest ways in which their own programme can adopt new aims. The idea here is to suggest that existing programmes can always be improved. You can adapt this activity to look at a national programme or a local, regional programme.

Estimated time: 45/60 minutes

Activity 5: Arguing the case for education.

This activity is a simple role play where participants have to argue against cuts in the education programme proposed by a union executive. Those arguing against the cuts have to demonstrate the value of union education to the union. This activity can be set up between two groups and the rest of the participants acting as observers. If you want to maximise participation you may chose to run a number of different role plays in turn.

With a role play like this it will be important to summarise the key arguments in favour of union education.

Estimated time: 45 minutes

Activity 6A: Learning from other unions

The four case studies of IMF affiliated unions have been selected to learn about how other unions organise their education. As the case studies will take a while to absorb this activity is organised as a jigsaw activity.(see page 55) Participants work in four different groups and each group looks at one of the case studies and discusses it. They then have to go to another group and tell the group about the case study. They will also learn about the other case studies from other group members. Jigsaw activities are a good way of reinforcing recently acquired knowledge. They also avoid repetitive and lengthy report backs. They are described on page 55.

Estimated time: 60 minutes

Activity 6B: Learning from other unions

This is a more traditional approach to the case studies. Participants are asked to look at all four case studies and identify any common themes or interesting ideas that they might adapt for their own programmes. If you decide to use this activity and not six a, you will need to be aware that participants will spend quite a long time reading through the four case studies.

Estimated time: 75 minutes.

Activity 7: The scope of union education programmes

The last activity in this section poses some basic questions about dealing with wider political and social issues. Should this be done and if so how? It also asks whether skills can be considered political. The purpose of the activity is to develop debate around one of basic issues of union education programmes. Should they deal with wider social and political issues or be focused on a narrower skills based agenda? It also asks whether these two things are contradictory.

Although described as a small group activity these questions could also be raised as part of a whole group discussion.

Estimated time: 45 minutes

Summary

This part of the manual may be most useful if you are working with participants from a number of different unions. It is also a useful resource section if a union is wishing to review its education programme. Even if you are working with educators from the same union it may be helpful to examine the general aims of education. There is also a natural link between this second part of the manual and the first.

Part Three: The Union Education Process

Part three of the manual is concerned with the education process. The education process is broken down for analysis into what is described as the three main elements; participants, the educator and the educational material.

Activity 8: A profile of your course participants

This is a key activity and participants are asked to build a profile of the main characteristics of the target group they are teaching. It is designed to make educators think about the nature of their target group and their strengths and limitations. In this way they can design or put together appropriate educational material.

In order to produce some variety in reporting back it is suggested you ask small groups to select different target groups, if this is possible. In summarising this activity you should stress that a process like this is always useful when preparing materials for a new group of unionists.

Estimated time: 45 minutes

Activity 9: Responding to women members educational needs.

Building a profile of who you are working with is a simple form of learning needs assessment. This activity takes this a stage further by looking at a survey of women members conducted by the United Steelworkers of America. Small groups are then asked to come up with an educational strategy for meeting these needs. This is the kind of activity you would use with education officers, rather than study circle leaders.

You should note that there is no separate section on women in the manual. A mainstreaming approach has been taken instead.

Estimated time: 45 minutes

Activity 10: Identifying learning needs.

This is more general activity on learning needs, where participants are asked to select a group they wish to work with and discuss what they think the main learning needs will be. The activity demonstrates the importance of collective brainstorming when starting to put together a course or study circle. You will need to divide your participants into small groups and it is again useful if some of the target groups are different.

Estimated time: 45/60 minutes

Activity 11: Improving your education resources

An important skill for any educator is to find appropriate resources. There is some text on this to help new educators think about where best to look. This activity makes participants think about what key resources they use currently and how they might develop these resources further.

Estimated time: 45 minutes.

Summary

The activities in this part of the manual are designed to make future educators/ study circle leaders think about the education process. In particular to start by looking at what the educational needs are of the target group. In summarising these activities it will also be important to stress that educational needs are also defined by union policy and increasingly the threats facing unions in many countries. Reference back to the case studies in part two and forwards to the case studies in part nine would be useful here.

You may notice that there is no activity in this section on the role of the educator/ study circle leader, although there is an important checklist. This is because the role of the educator is discussed extensively in the next three parts of the manual.

This would be a good time to review the different kinds of activities that have been used so far as you are about to go on and ask participants to write and run their own activities.

Part Four: Group Work

This is the part of the manual concerned with teaching participants to construct and run small group activities effectively. Facilitating small group activities is divided into four distinct stages and tips given on each stage.

Activity 12: Model session

The best way to demonstrate what is involved is for the tutor to run a model session. Observers are selected to look at what is done and an observation form is used (page 51) by selected participants. In selecting a model activity you need to choose an activity that is easy to follow and has a specific outcome. When the model activity is finished the observer will give a report of how the activity was conducted.

Estimated time: will depend on the activity selected. It is suggested that the activity and observer report should not take longer than an hour.

Activity 13: Practising using activities / Activity 14: writing your own activities.

Depending upon you target group you can now select either activity 13 or 14. Activity 13 asks participants to work in pairs or small groups to run an education session using existing material, while Activity 14 asks participants to prepare their own activity and then run it. The first may be appropriate for new study circle leaders and the second for educators.

Whichever you choose, the teaching practice sessions are much the same. Each group of 2/3 participants run an education session using the other participants in the workshop. One participant is usually selected to observe what the group does, using the observation form. At the end of the session the observer gives a report. This report can then be reinforced by the tutor. To avoid too much negative criticism an observer should be asked to mention at least one positive observation for every negative one. The tutor should make a positive comment at the end of the session.

You will need to timetable in a session for the different groups to prepare their sessions. You will need to be available for advice and support while they are doing this. If participants are preparing their own activities, rather than using existing material they will need more time. It may be useful to have a sample pack of activities available for them to look at

As all participants will need to run a session, these teaching practice sessions will take time. They represent the core of a training trainers course or workshop. It is likely that the model session, practice sessions and reinforcement of the key skills involved will take up to two days. You will need to think about this when deciding how many people to train in any workshop or course.

Estimated time: 45 minutes preparation for existing material, 90 minutes to prepare own activity
Allow one hour for each group of 2/3 participants to run their session and receive feedback.

Activity 15: Strengths and weaknesses of group work

This activity identifies some of the strengths and weaknesses of group work. Having identified some of the weaknesses participants are given some of these weaknesses in groups to suggest how they may be minimised. The main point of this activity is to indicate that some of the weaknesses are concerned with poor practice and planning and can be minimised or removed by good practice.

Estimated time: 25 minutes task one, 45 minutes task two

Part Five: Active Learning and the Whole Group

This part of the manual deals with developing activities that take place with the whole group or workshop. They include managing discussion, whole group activities like sculptures and mapping, field visits and using films and videos. The central idea here is that an active approach is not limited to small group work and that small group work and whole group activities can be part of an integrated approach.

Activity 16: Managing discussion / Activity 17: Developing a general session

These two activities are concerned with planning and managing general discussion. This is an essential skill for prospective educators to develop and they are key activities. We suggest you include one or both of them in your timetable.

In Activity 16 participants are asked to think about how they would tackle a number of common problems. To avoid repetition in the report back stage it might be useful to give groups different problems to work with. If the problems are not relevant to your own movement, then we suggest you construct some of your own to add to the list that are more appropriate.

Activity 17 is designed to emphasise the need to plan a general session and develop key questions to construct the session. Participants work in pairs and in summarising the session a few pairs could be asked to indicate what questions they have developed to construct the session and why.

Estimated time, Activity 16: 30 minutes
Activity 17: 30 minutes

Activity 18: Preparing a whole group activity

This activity follows some text which describes different kinds of whole group activity like mapping, sculptures etc. Groups are asked to come up with their own ideas for a whole group activity. If you have time you may wish to demonstrate one or two of their

ideas. Most whole group activities are relatively quick and will only take a few minutes to organise.

Estimated time: 30 minutes, add another 30 minutes if some groups demonstrate their whole group activities.

Activity 19: Using speakers

This activity deals with the use of outside speakers. It is designed to make participants think about why they are used, how to make best use of them and how to prepare for an outside speaker. The main message here is to integrate their presentation into the aims or learning outcomes of the course or study circle.

Estimated time: 45 minutes

Activity 20: Using films and video

The use of films videos, cd's and dvd's is guided by a similar message. A different approach is taken here and participants are paired up to argue the case for and against the use of visual media. In summarising this paired role play you can reinforce the message of planning and appropriate use.

Estimated time: 45 minutes

Summary

This part of the manual examines different ways of working with course participants without dividing them into small groups. It seeks to demonstrate that whole group activity can be varied, active and structured. How many of the activities you choose to include may well depend upon the time you have available and your own priorities. It is important for new educators to understand that they can balance small group working, role plays etc with whole group sessions as they gain experience. The skill of managing general discussion is something they will all need to be confident about.

Part Six: Developing Your Educational Materials

This part of the manual is mainly concerned with designing educational materials. It deals with the essential elements involved in developing a course or programme. This includes focusing on educational needs, developing course aims or learning outcomes and developing and structuring a course or workshop. It covers some of the basic principles of curriculum development using active learning methods.

Activity 21: Critiquing your education materials.

This activity is designed to develop a critical approach to educational materials. Ideally participants can bring in some of the material they currently use to critique. Alternatively

the tutor can provide examples for participants to look at. They are asked to examine the material against some of the adult education principles they will now be familiar with. It is helpful if the groups look at different material or examples.

In summarising this activity it is important to be positive and stress that all education materials should be assessed from time to time and improved.

Estimated time: 45 minutes

Activity 22: Approaches to health and safety

This activity is designed to reinforce the idea of a union approach to issues. Participants work in pairs and contrast a management approach to health and safety training and a union approach. It serves to remind union educators, who are preparing their own materials, that union education is not just technical. It should be built round a union perspective. The report back can be verbal with two or three pairs indicating what ideas they have come up with.

Both this and the previous activity are designed to make participants aware of the political and social values that should underpin union education.

Estimated time; 45 minutes

Activity 23: Meeting changing needs

This activity addresses the question of changing educational needs. It asks participants to think about the factors that might make educational material out of date and in need of change. Groups are then asked to come up with ideas to identify changing needs. Here the report back could be organised by the tutor writing up the ideas on whiteboard. Each group could be asked for one idea at a time to compile a list.

Estimated time: 45 minutes

Activity 24: Writing workshop aims

Writing workshop aims is often a starting point for material development, once learning needs have been identified. This activity asks groups to look at two examples of workshop aims in the text and improve them. In a second task the groups are asked to select a course /workshop/ or study circle on a particular topic/ issues and write some aims for it. For this second task it would be useful if each group selected a different subject area to work with. This will make for a wider exchange of experience at the report back stage. Each group should be asked to put their aims on a flip chart to present their ideas.

Estimated time: task one 20 minutes, task two 30 minutes

Activity 25: Starting a workshop

There are now many different “icebreakers” used in union training and training generally. This is a paired activity where participants think about their own experiences of icebreakers and begin to identify what works well and what doesn’t. As with other paired

activities you can ask for a handful of responses from some of the pairs to draw out the key points.

Estimated time: 20 minutes

Activity 26: Linking activities together

One of the difficulties with curriculum development is to decide how to develop a subject or issues. In the text we suggest that an issue or topic can be broken down into an introductory stage, an analytic stage and an action or strategy stage.

This activity is designed to help participants use this framework to explore an issue / topic in depth. Groups are asked to select a topic / issues and plan a series of activities using this approach. This is a key activity for anyone involved in putting a workshop or course together. The text has examples for them to read through before they attempt their own plan.

Once again it would be useful if most of the groups are working on different topics or issues.

Estimated time: 60 minutes

Activity 27: Designing a workshop programme

Having looked at handling an issue in the previous activity this activity takes things one stage further and asks groups to draw up a plan for a whole course, workshop or study circle. Participants get an opportunity to practice timetabling and identifying suitable resources.

A gallery report back is suggested where the groups put their plans on flip charts around the room. The participants then walk around the room viewing the various plans and asking questions of the group members, who constructed them. Alternatively the different plans could be photocopied and distributed for discussion

Estimated time: 60/90 minutes

Summary

The activities in part six will mainly be of use if you are working with experienced educators or study circle leaders. They are designed to help participants develop some curriculum development skills. It is likely that you will also have to provide some course writing skills training if they are going to attempt major curriculum development. This is outside the scope of this manual.

Part Seven: Planning and Organising Your Educational Activities

There is a close relationship between this part of the manual and part six. Part six is more to do with the creative process in developing materials. This part is more about organising your educational sessions and activities. Most educators involved in union education will recognise that there is often a tension between these two aspects of running courses and workshops. Both well developed materials and well organised

education course and workshops are necessary elements of a successful union education programme.

Activity 28: Planning an education session

This activity aims to give educators and study circle leaders the skills to plan an education session effectively. It deals with issues like having clear aims and timing a session. Participants work in groups or in pairs to draw up a session plan. You will need to provide blank session planning forms for this activity. You may have your own or you can construct a session planning form along the lines of those used for the two examples on pages 96 of the manual.

Estimated time: 30 minutes

Activity 29: Improving your planning and organisation

This activity is built around an extensive checklist for organising educational course, workshops or study circles. Groups work on different headings in the checklist (e.g. recruitment, venue etc.) They are asked to draw up a strategy to improve this aspect of their own planning and organisation. They then give a report to another group who have looked at a different set of problems and listen to their ideas. The two reports are improved and then the main ideas placed on flip charts for other groups to examine.

Estimated time: 45 minutes

Summary

Good planning is an essential ingredient of union education. The financial resources for union education programmes are usually scarce. The checklist which is at the centre of this section was constructed by experienced educators. It is important to stress the practical use of this kind of checklist in ensuring educators are well organised and best use is made of these scarce resources.

Part Eight: Evaluation

This part of the manual deals with evaluation. It is concerned with issues such as the usefulness of evaluation, the different types of evaluation and the relationship between evaluation and reflection.

Activity 30: Reviewing your experience of evaluation

This activity is designed to assist participants reflect on their experiences of evaluation. It will help the tutor find out what evaluation tools the participants are familiar with. The participants will be able to compare their own experiences.

Estimated time: 30 minutes

Activity 31: Critiquing evaluation tools.

In stage one of the activity participants are asked to critique one of two example evaluation forms. A group who has worked on one form will work together with a group who looked at the other to compare their experiences. One of the forms is mainly quantitative and the other qualitative. The idea is to promote a discussion between the two and assess when their use is relevant.

In summarising this activity you may wish to stress the importance of looking at evaluation tools and assessing their usefulness and the need to improve them.

Estimated time: 45 minutes

Activity 32: Who to involve in your evaluation programme.

The main purpose of this activity is to get participants to think about the scope and information to collect in an evaluation exercise. Groups are given one or two specific scenarios and then asked to identify who to involve and what to ask them. The scenarios can easily be replaced by more specific scenarios if these are more relevant to the group being trained. It may be useful to use a gallery report back mechanism for this exercise.

Estimated time: task one 30 minutes, task two 30 minutes

Activity 33: Critiquing your evaluation tools.

This is a more complex activity than activity 31, which can be used when you are working with educators who have an evaluation scheme already in place. The activity encourages participants to become familiar with the Kirkpatrick model of evaluation. It also highlights how to use the results of evaluation exercises.

Estimated time: 90 minutes.

Summary

Effective evaluation of union education programmes is both valuable and useful. This part of the manual encourages educators to go beyond the traditional end of course evaluation form and find out what a range of stakeholders feel about a particular programme. It is useful for educators to understand some of the basic concepts involved. The Kirkpatrick model is useful for those involved in evaluating complete programmes.

If one of the goals of union education programmes is to bring about change then measuring whether this change has happened becomes of critical interest.

Part Nine: Union education, change and the global economy.

The final part of the manual deals with some of the current wider political, social and economic issues that make up the environment in which union education takes place. The first case study is based on the experience of the Australian trade union movement in fighting decline. The second case study is from the metalworkers in Brazil dealing with unemployment. This is followed by examples of a Canadian union and UK unions

developing education materials on globalisation. The section ends with the IMF policy on globalisation.

Activity 34: Organising in everything we do

This activity explores the link between union education and organising, based here on the Australian experience. Participants are asked to look at their own courses and develop greater links between education and organising. If participants don't have existing course material with them then they can be given a number of different scenarios in groups. Having developed a report on what they are going to do they work together with another group to compare experiences and ideas.

Estimated time: 60 minutes

Activity 35: Working with the unemployed

This activity is built round the Brazilian case study, where the Brazilian metalworkers have developed extensive programmes with the unemployed. As with the previous activity participants come up with some ideas in small groups and then compare their reports with another group.

Estimated time: 45 minutes

Activity 36: Dealing with globalisation / Activity 37: education and globalisation.

The final two activities in the manual deal with globalisation and union education. Activity 36 poses three basic questions about globalisation. It is suggested that participants work in pairs to answer them.

Activity 37 asks participants to work in groups on one of two tasks. The first is to examine opportunities to introduce global issues into existing programmes. The second is to outline a specific course for a specific target group on global issues. The groups place their ideas on flip charts and report to the whole course workshop. The examples from IMF affiliates in Canada and the UK will be helpful resources, as will the IMF policy on globalisation. An alternative would be to give groups both of the tasks. If you do this you will probably need to organise a report back after each task is completed.

Estimate time: Activity 36, 45 minutes
Activity 37, 60 minutes.

Summary

This final part of the manual has many links to part one. They are both concerned with the political and social context of union education. It will be useful to make links between the case studies in part one.

Unions have always been concerned with issues such as the economy and the distribution of wealth. As the global economy has developed it is inevitable that unions will need to deal with global issues in their education programmes. Questions such as who is currently benefiting from globalisation and the behaviour of global institutions become paramount if an alternative to corporate driven globalisation is to be realised.